

LOUISIANA

OFFICE OF THE LT. GOVERNOR
Department of Culture, Recreation & Tourism



FINAL REPORT

Perceptions of New Orleans/Louisiana

Tracking Study

August 14, 2008

mdrg

Market Dynamics Research Group, Inc.

Table of Contents

◇	Background and Reporting		3
◇	Research Timeline & Reporting		4
◇	Research Objectives		5
◇	Methodology		6
◇	Sample by Market and Wave		7
◇	Overall Perceptions		8
◇	Key Findings		11
	❖ Likelihood to Visit	11	
	❖ Impact of Louisiana/New Orleans Advertising	16	
	❖ Influence of Hurricanes	22	
	❖ Perceptions of Louisiana among Respondents Not Likely to Visit	26	
	❖ Agreement with Statements about Visiting Louisiana	31	
	❖ Importance and Performance	34	
	⇒ Total Key Markets	35	
	⇒ Nationwide	41	
	❖ Respondent Travel Profile	47	
	❖ Demographics	54	
◇	Appendix A: Importance and Performance: Atlanta, Houston, and Other Target Markets		56
◇	Appendix B: Likelihood to Visit Scorecards		75
◇	Appendix C: Questionnaire		78

Background and Reporting

Background

- ◇ The mission for the New Orleans Tourism Marketing Corporation (NOTMC) is to promote the city as a leisure tourism destination throughout the year, particularly during the traditionally slow months of summer and the weeks between Thanksgiving and New Year's. ^[1]
- ◇ The mission of the Louisiana Office of Tourism (LOT) is to preserve and enhance Louisiana's unique heritage and natural landscape; provide cultural, informational, and recreational resources; and promote the use of these resources by our diverse citizens and visitors. ^[2]
- ◇ The NOTMC and the LOT along with their advertising agency, Peter A. Mayer Advertising, Inc. (PAM), commissioned a market research study to gauge perceptions of New Orleans and Louisiana while the city and state rebuild from Hurricanes Katrina and Rita. MDRG proposed a tracking study to be conducted approximately once a quarter beginning in January 2006 to capture a benchmark of perceptions, and changes over time.

Reporting

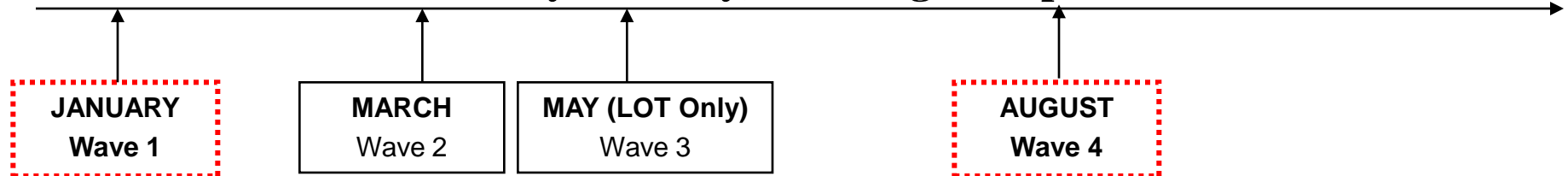
- ◇ This document details findings from the most current Wave of data collection (July 2008). Prior Waves were conducted as follows:
 - ❖ 2006: January, March, May (LOT only), and August
 - ❖ 2007: January, April, August, and November
 - ❖ 2008: January, April

^[1] <http://www.neworleansonline.com/notmc/aboutus.html>

^[2] <http://www.crt.state.la.us/secretary/mission.aspx>

Research Timeline & Reporting

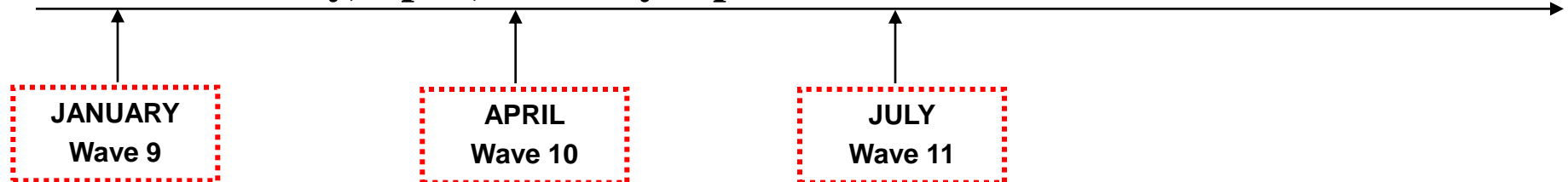
2006 – Benchmark (usually January) and August reported herein



2007 – August and November reported herein



2008 – January, April, and July reported herein



 =Reported herein

Research Objectives

Research Objectives

- ◇ The overall objective of the research is to track perceptions of New Orleans/Louisiana in key advertising markets and nationwide. Specific objectives include:
 - ❖ To measure current perceptions of New Orleans/Louisiana as a leisure destination post- Hurricane Katrina and Rita
 - ❖ To measure the impact of the current advertising campaigns
 - ❖ To track changes in perceptions over time

Methodology

Methodology

- ◇ Data was collected using an Internet-based web survey methodology. A total of 6,630 individuals from the e-Rewards Internet panel were invited to participate in the survey.
- ◇ The survey was available on MDRG's website from July 16-21, 2008 and took an average of 12.2 minutes to complete.
- ◇ A total of 1,327 Nationwide and Key Market (Atlanta, GA; Houston, TX; Dallas, TX; Pensacola, FL; Memphis, TN; Jackson, MS; Mobile, AL; Birmingham, AL) panelists accessed the survey, and 913 panelists completed the survey.
- ◇ Respondents were screened to ensure that they:
 - ❖ Are at least 25 years old
 - ❖ Have household incomes of at least \$50,000
 - ❖ Take at least one trip per year that includes a paid overnight stay
 - ❖ Either share equally or are the primary decision maker when making leisure travel plans
 - ❖ Do not currently live in Louisiana and did not live in Louisiana prior to Hurricanes Katrina and Rita
 - ❖ Are not employed in the travel, market research, marketing, or advertising industries

Sample by Market and Wave

	KEY MARKETS				
Wave	Atlanta	Houston	"Other" Target Markets	TOTAL	NATIONWIDE
1. January 2006	101	100	211	412	250
2. March 2006	100	100	200	400	216
3. May 2006 (LOT Only)	101	100	200	401	201
4. August 2006	100	100	202	402	200
5. January 2007	115	115	216	446	224
6. April 2007	103	102	205	410	211
7. August 2007	109	112	211	432	200
8. November 2007	101	101	205	407	203
9. January 2008	200	201	201	602	302
10. April 2008	201	201	202	604	302
11. July 2008	203	201	203	607	306

"Other" Target Markets: Dallas, TX; Pensacola, FL; Memphis, TN;
Jackson, MS; Mobile, AL; Birmingham, AL

Overall Perceptions

Summary: Intent to Visit Louisiana

Likelihood to Visit Louisiana other than New Orleans
 % “top box” (4-5 on 5-point scale)

	1. January 2006 (Benchmark)	4. August 2006 (1 year)	7. August 2007 (2 years)	8. November 2007	9. January 2008	10. April 2008	11. July 2008
Key Markets	29	28	27	24	25	25	26
Nationwide	24	15	10	8	7	11	9

◇ ***Intent to visit has stabilized.***

- ❖ “Top-Box” (4-5 on 5-point scale) likelihood to visit percentages among Key Market respondents have been fairly stable since the benchmark in 2006 (see table above).
- ❖ Among Nationwide respondents, the highest intent to visit was in the first wave (24% “top box”). Since that time, about 1 out of 10 respondents said that they are likely to visit Louisiana in the next year (see table above).

◇ ***Key Market respondents aware of Louisiana advertising are more likely to visit and have more positive perceptions of Louisiana.***

- ❖ Nearly one-third (31%) of ad aware respondents were likely to visit Louisiana (“top-box” responses) compared to 16% of respondents not aware of the advertising. Further, ad aware respondents rated Louisiana’s performance on 14 leisure travel attributes significantly higher than unaware respondents on all but one attribute (*safe and secure*).

◇ ***Respondents who recently visited Louisiana are the most likely to return – suggesting their experiences were positive.***

- ❖ Over half (52%) of respondents who visited Louisiana in the past 2 years rated their likelihood of returning in the next year in the “top box.” In contrast, only 6% of respondents who have never visited Louisiana said that they would make a trip to the state in the next year.

Summary: Perceptions of Louisiana

◇ ***Perceptions of Louisiana are fairly positive and have improved dramatically since 2006.***

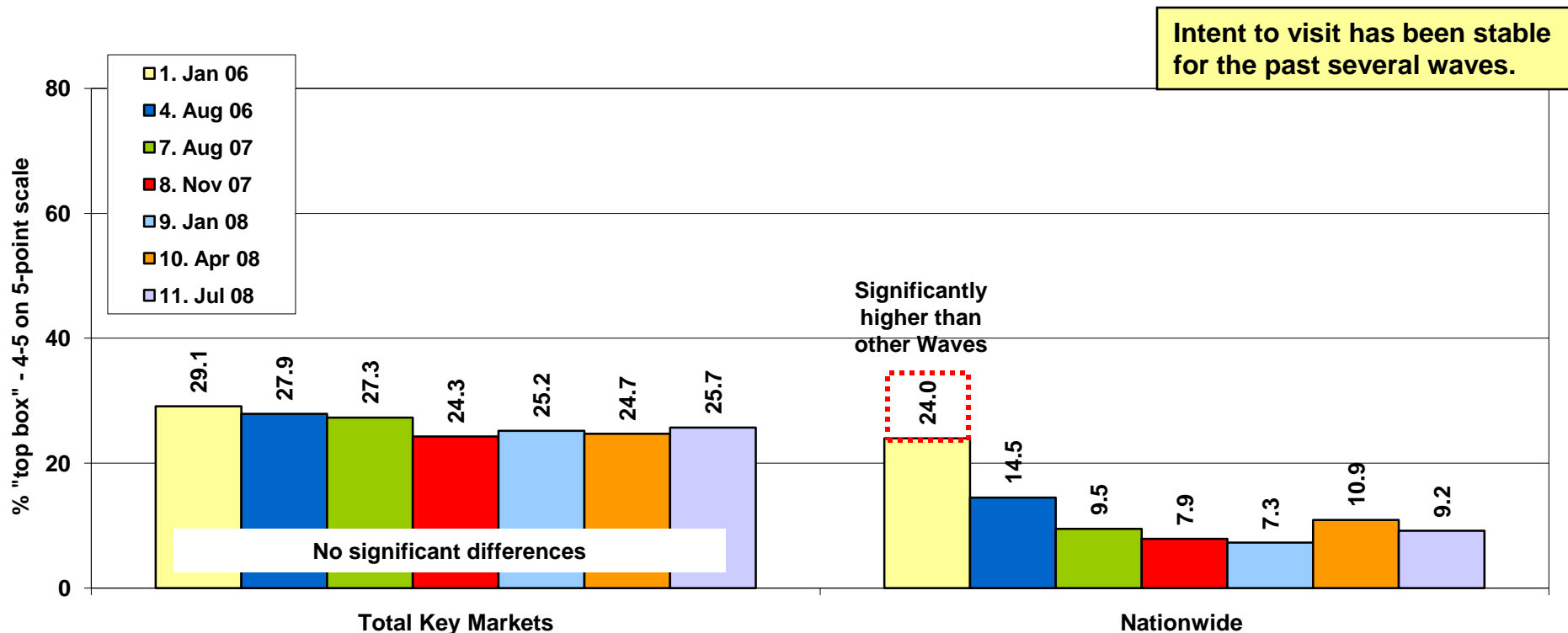
- ❖ The percentages of respondents citing that they are not interested in visiting Louisiana because of the availability of hotel rooms is currently negligible and significantly lower than in 2006 (see charts at pages 26-30).
- ❖ About 6 out of 10 Key Market (58%) and Nationwide (58%) respondents agree that *Louisiana still has many areas and attractions to visit*.
- ❖ Conversely, only about 1 in 5 Key Market (20%) and Nationwide (17%) respondents agree that *many places have been destroyed and Louisiana is not a good place to visit now*.
- ❖ Louisiana receives relatively high performance scores on several important leisure travel attributes.
 - ⇒ Respondents have consistently rated *superb restaurants, unique experiences, and moderately priced accommodations* as important, and perceive that Louisiana delivers these attributes fairly well (see charts at pages 34-46).

◇ ***Nonetheless, there are lingering concerns about safety.***

- ❖ By far the most important leisure travel attribute for Key Market (4.60 on 5-point scale) and Nationwide (4.54 on 5-point scale) respondents is *safe and secure*.
- ❖ Average performance scores for this attribute are the lowest by far (2.67 and 2.76 for Key Markets and Nationwide, respectively).

Key Findings: Likelihood to Visit

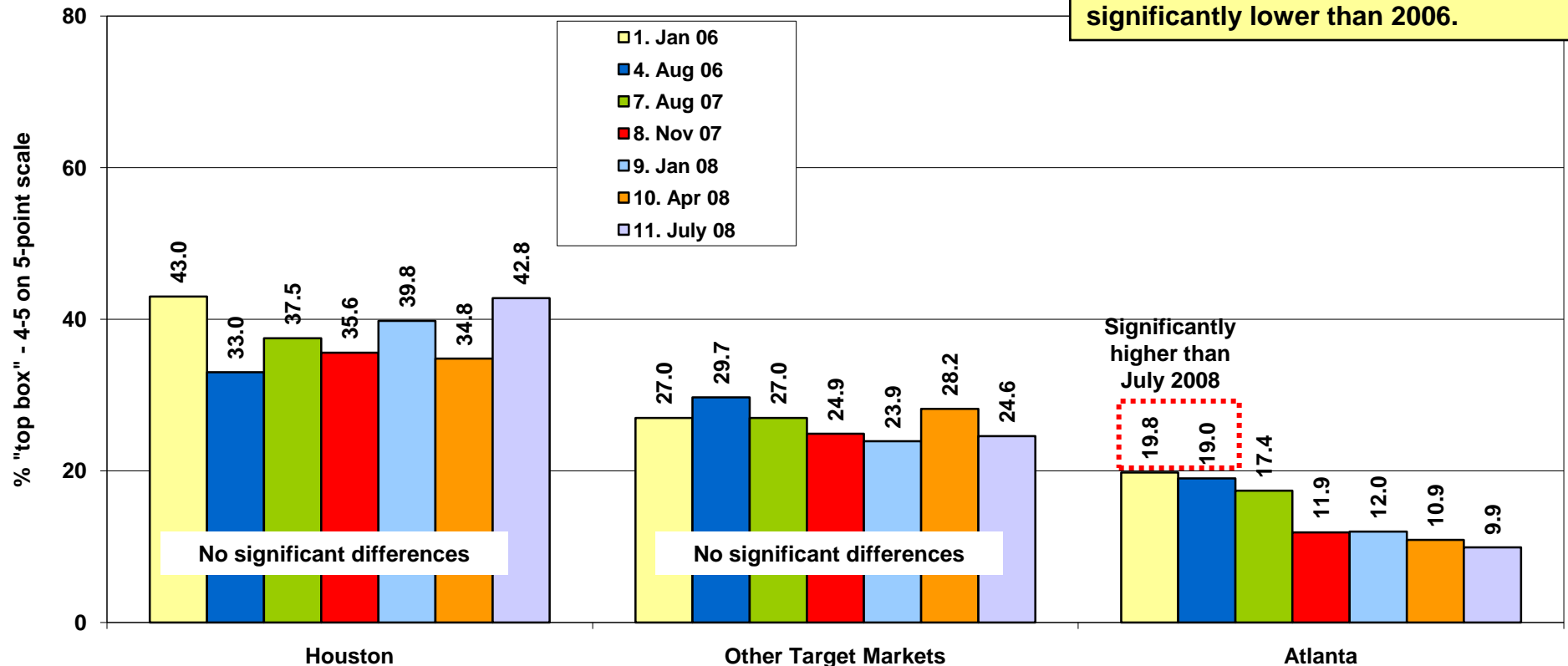
TOTAL KEY MARKETS AND NATIONWIDE Likelihood to Visit Louisiana Other Than New Orleans in the Next 12 Months



ATLANTA, HOUSTON, & OTHER TARGET MARKETS

Likelihood to Visit Louisiana Other Than New Orleans in the Next 12 Months

The downward trend in intent to visit among Atlanta respondents is now significantly lower than 2006.



TOTAL BY RESPONDENT TRAVEL CHARACTERISTICS

Likelihood to Visit Louisiana Other Than New Orleans in the Next 12 Months

July 2008 (4-5 ON 5-POINT LIKELIHOOD SCALE)	BASE	% "TOP BOX"
NUMBER OF TRIPS PER YEAR		
1-3	429	17.7
4+	484	22.3
TRAVEL HISTORY TO LOUISIANA AND NEW ORLEANS		
Never visited New Orleans, Never visited Louisiana	230	5.7
Visited New Orleans before, Visited Louisiana before	494	29.6
Visited New Orleans before, Never visited Louisiana	153	7.2
Never visited New Orleans, Visited Louisiana before	36	38.9
NEWS CONSUMPTION		
Less than every day	588	18.9
Every day	325	22.5
LAST TIME VISITED LOUISIANA		
Visited Louisiana within the last 2 years	232	52.2
Visited Louisiana 2-5 years ago	108	15.7
Visited Louisiana 5+ years ago	190	11.6
Never visited Louisiana	383	6.3

Recent, prior visitors are the most likely future visitors.

TOTAL BY RESPONDENT DEMOGRAPHIC CHARACTERISTICS

Likelihood to Visit Louisiana Other Than New Orleans in the Next 12 Months

Except for respondent race, there are no differences in likelihood to visit by demographic characteristic.

July 2008 (4-5 ON 5-POINT LIKELIHOOD SCALE)	BASE	% "TOP BOX"
INCOME		
\$50k to less than \$100k	476	18.1
\$100k or more	437	22.4
LEVEL OF EDUCATION		
Less than College	242	21.1
College Graduate	376	20.2
Post Graduate Degree	295	19.3
HOUSEHOLD		
Married/Living with Partner with Children	343	19.5
Married/Living with Partner w/o Children	389	20.8
Single with or without Children	181	19.9

July 2008 (4-5 ON 5-POINT LIKELIHOOD SCALE)	BASE	% "TOP BOX"
AGE		
25-34	243	17.7
35-44	246	23.2
45-54	233	21.9
55 or older	191	17.3
RACE/ETHNICITY		
Caucasian/White	722	17.9
African American/Black	117	30.8
Other Race/Ethnicity	74	25.7

Key Findings: Impact of Louisiana/New Orleans Advertising

Introduction

- ◇ The impact of advertising is measured by examining the differences between ad aware and not aware respondents on 3 key metrics:
 1. Likelihood to visit
 2. Performance of Louisiana on leisure travel attributes

PERCEPTIONS OF ATTRACTIONS	PERCEPTIONS OF ATMOSPHERE
<i>Restaurants that offer superb, local cuisine</i>	<i>Environment that is clean and unspoiled</i>
<i>A variety of historical and cultural attractions</i>	<i>Safe and secure</i>
<i>Luxury accommodations</i>	<i>Good place to relax and unwind</i>
<i>Unique shopping opportunities</i>	<i>Beautiful and scenic</i>
<i>Exciting gaming and nightlife</i>	<i>Great weekend getaway</i>
<i>Unique experiences you cannot get anywhere else</i>	
<i>Moderately priced accommodations</i>	
<i>Interesting fairs and festivals</i>	
<i>Attractions the whole family, including children, can enjoy</i>	

3. Agreement with statements about Louisiana as leisure travel destination:
 - ⇒ *Louisiana has many areas and attractions to visit*
 - ⇒ *There are many places that have been destroyed and Louisiana is not a good place to visit now*

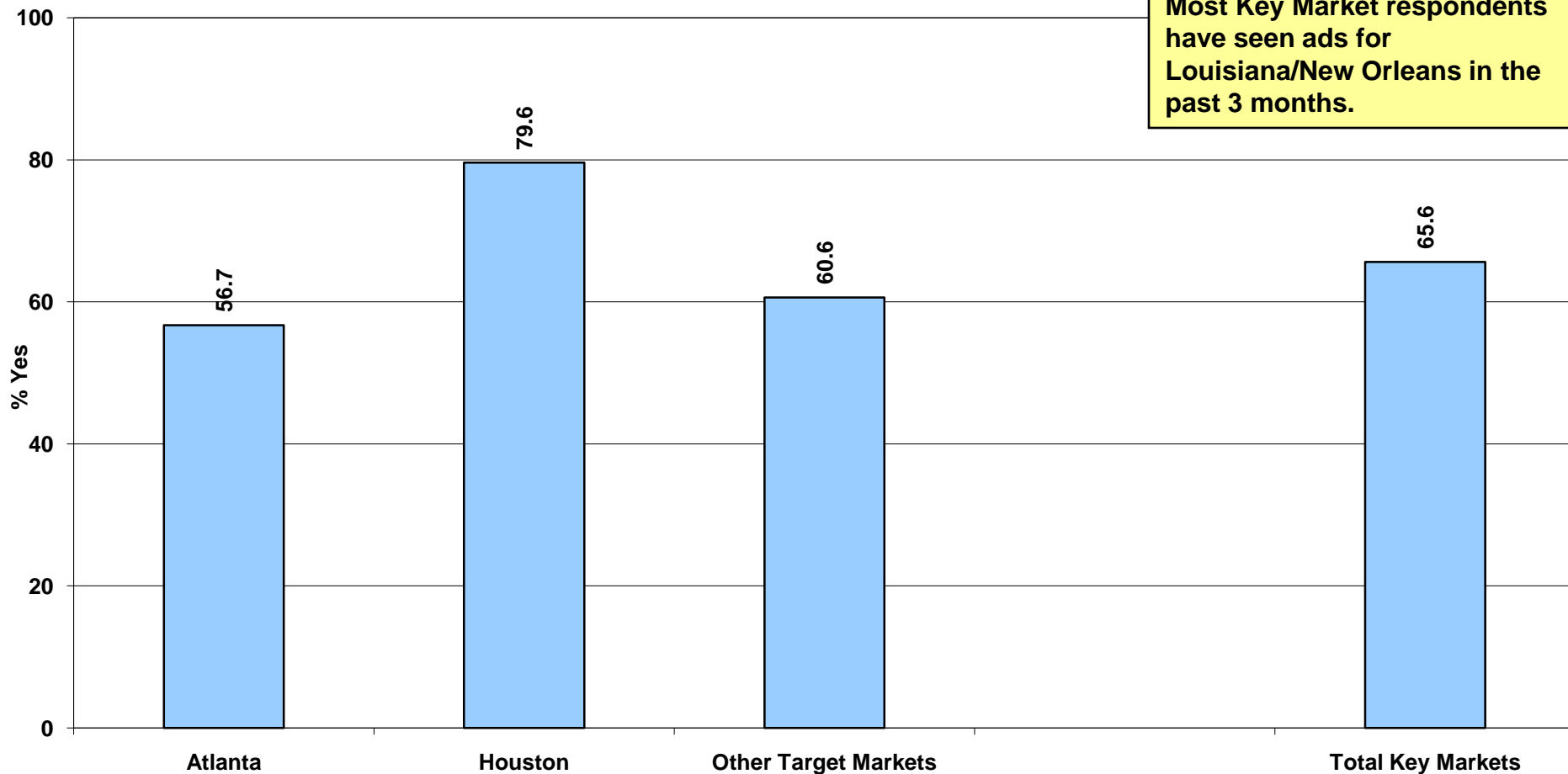
NOTE: Performance results are presented for each leisure travel attribute. The classification as “attraction” or “atmosphere” is used in advanced analysis (not presented).

SAMPLE GROUPS

Seen Louisiana/New Orleans Travel or Tourism Ads in Past 3 Months

July 2008

Most Key Market respondents have seen ads for Louisiana/New Orleans in the past 3 months.

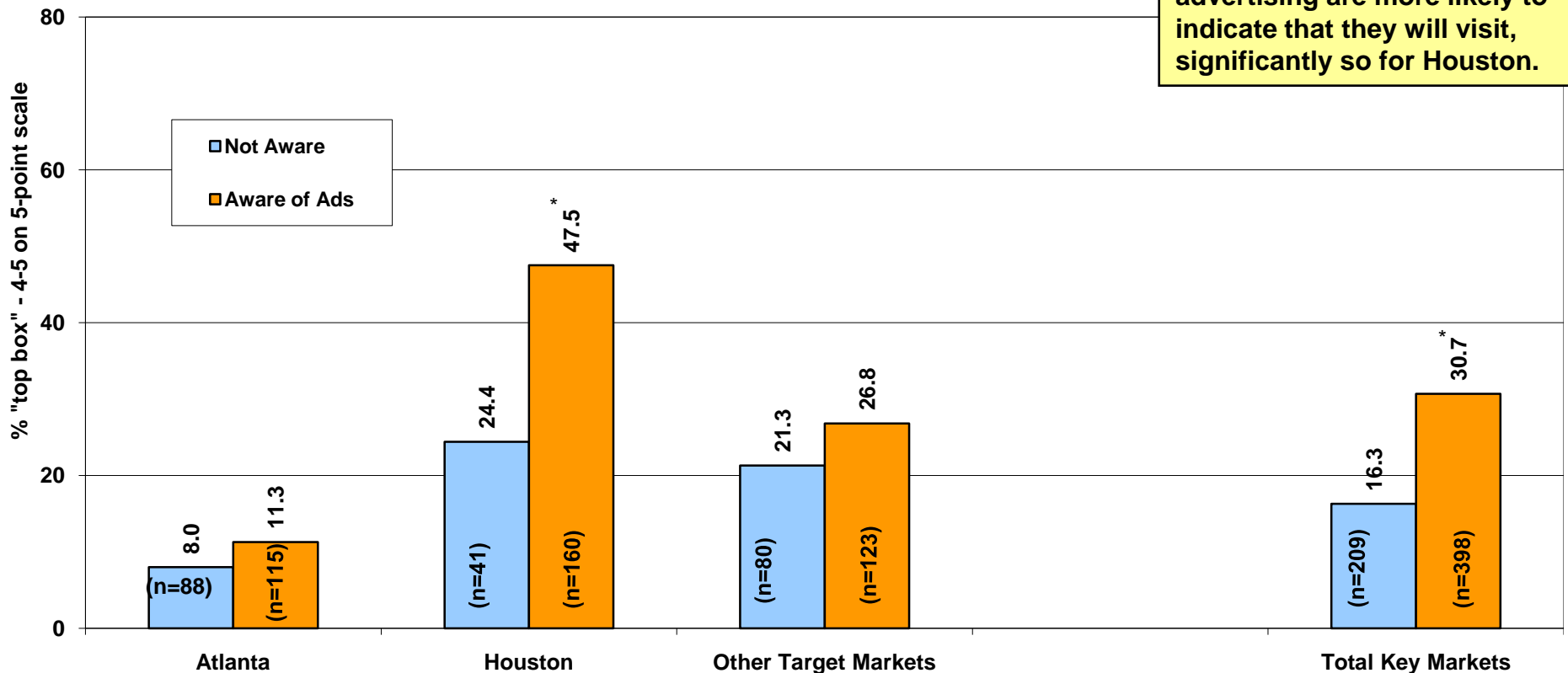


SAMPLE GROUPS BY AD AWARENESS

Likelihood To Visit Louisiana Other Than New Orleans In the Next 12 Months

July 2008

Respondents aware of the advertising are more likely to indicate that they will visit, significantly so for Houston.

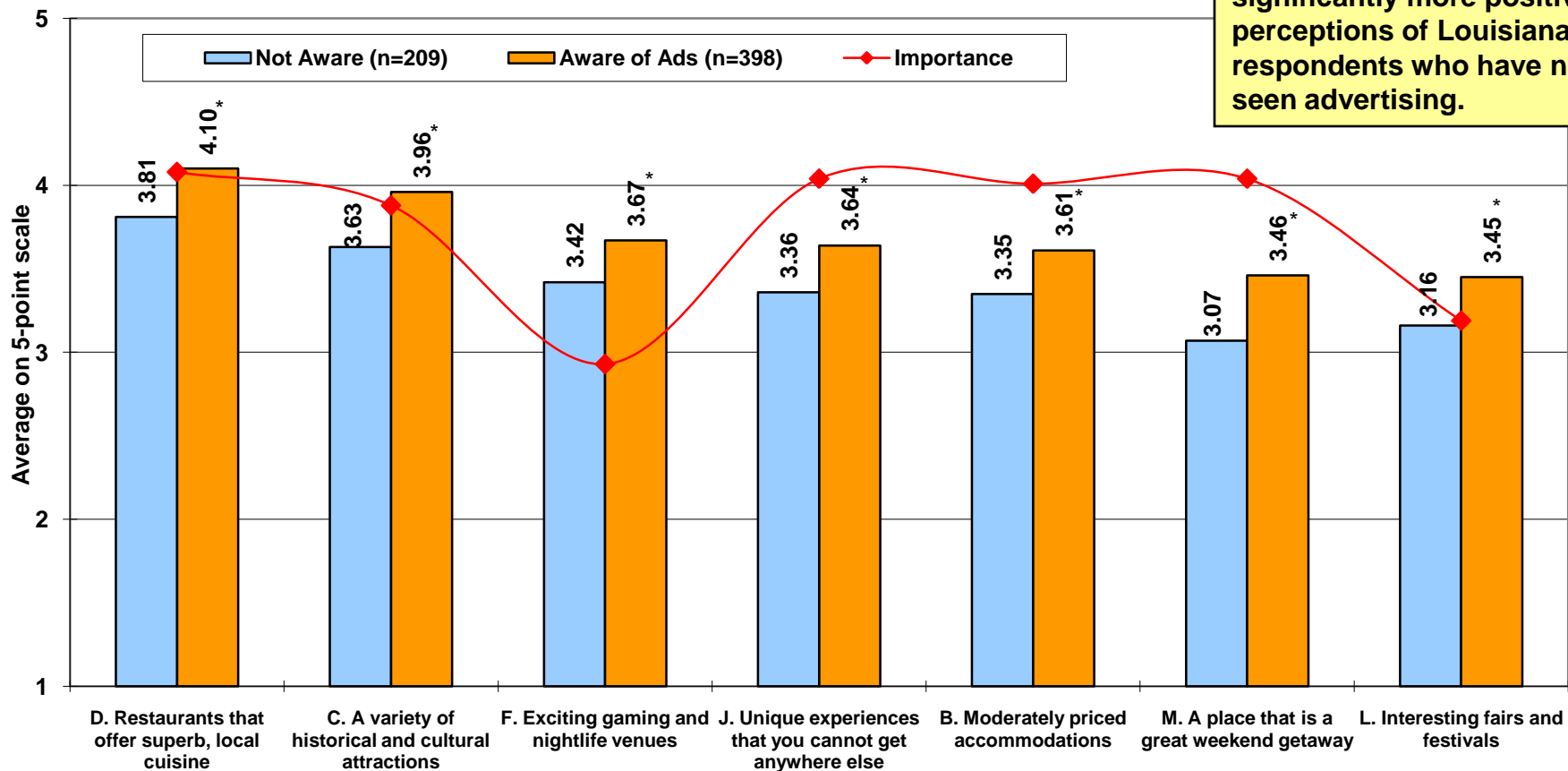


* Significantly different from Not Aware at 95% level

TOTAL KEY MARKETS BY AD AWARENESS

Performance of Louisiana on Leisure Travel Attributes

July 2008

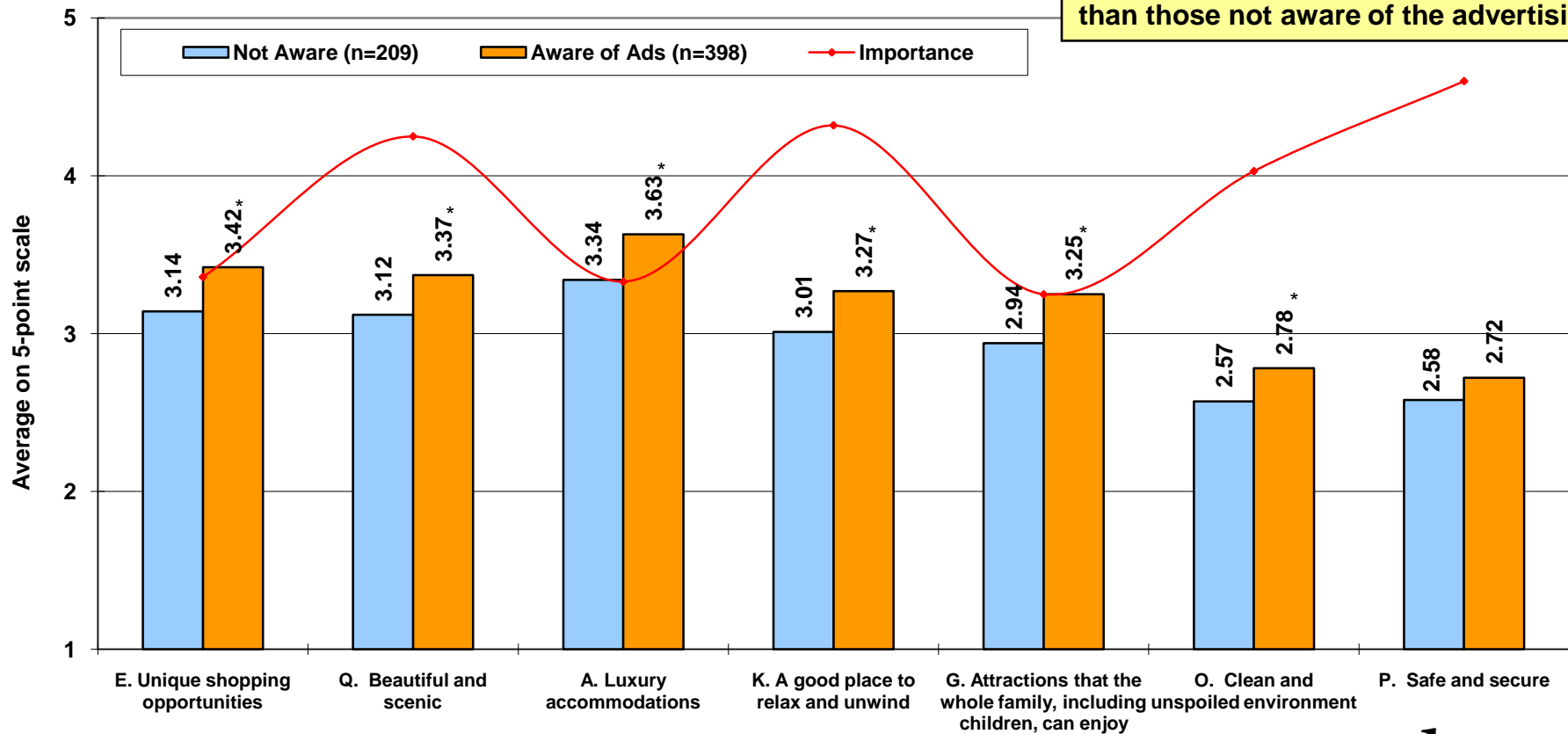


TOTAL KEY MARKETS BY AD AWARENESS

Performance of Louisiana on Leisure Travel Attributes

July 2008

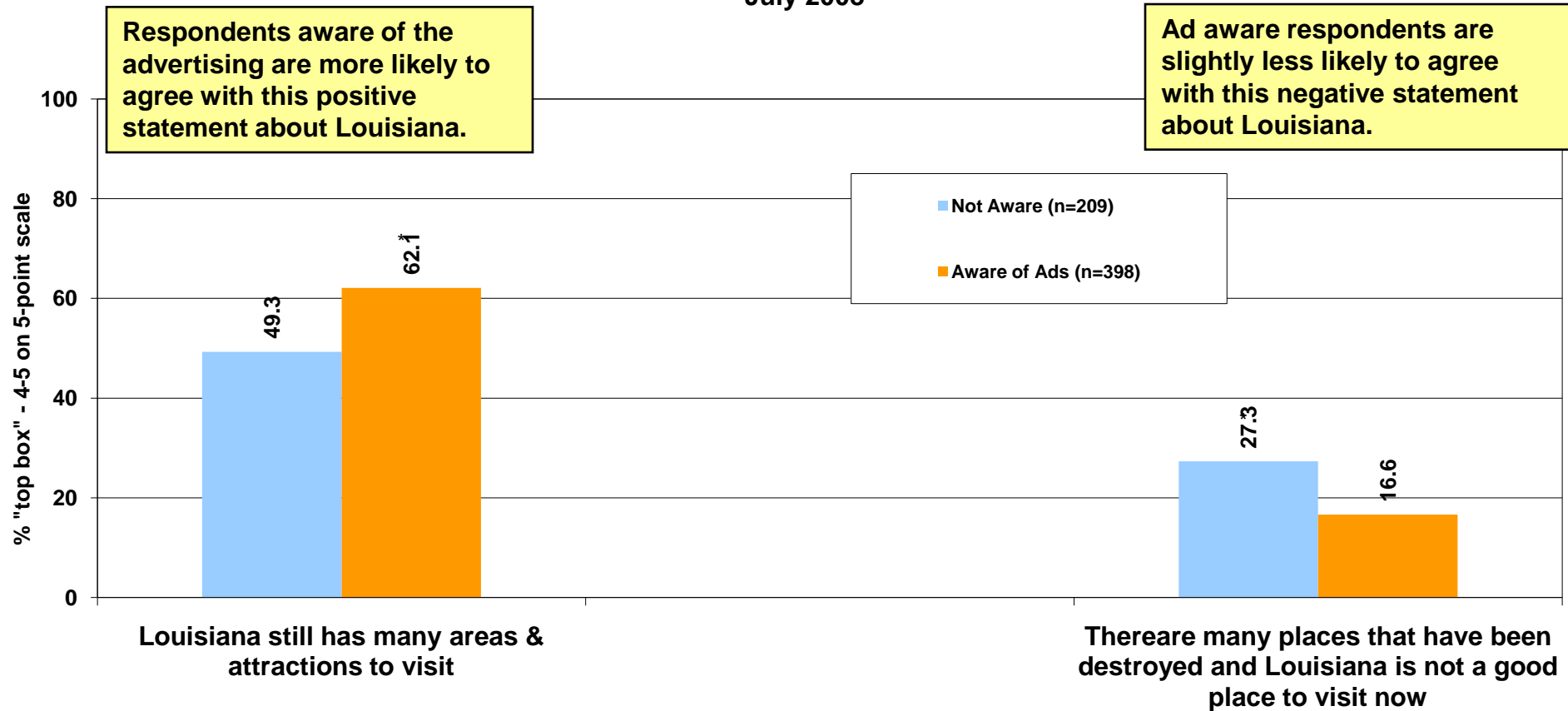
Except for perceptions of "safe and secure," ad aware respondents rate Louisiana significantly more favorably than those not aware of the advertising.



TOTAL KEY MARKETS BY AD AWARENESS

Perceptions of Louisiana as a Travel Destination

July 2008



* Significantly different from Not Aware at 95% level

Key Findings:

Influence of Hurricanes

Introduction

- ◇ Respondents who rated their likelihood to visit Louisiana as 3-5 on a 5-point scale are categorized as “Would consider a pleasure trip to Louisiana.”
- ◇ Respondents not likely to visit Louisiana were asked to characterize themselves based on how the hurricanes affected their vacation plans to Louisiana. They had 4 options:
 1. Would not consider a pleasure trip to Louisiana anytime of year, although did before Hurricanes Katrina and Rita
 2. Would not consider a pleasure trip to Louisiana during hurricane season, although did before Hurricanes Katrina and Rita
 3. Would not consider a pleasure trip to hurricane-prone parts of Louisiana, although did before Hurricanes Katrina and Rita
 4. Would not and have not considered a pleasure trip to Louisiana

Likelihood to Visit Louisiana

BY WAVE

	KEY TARGET MARKETS						
	1. Jan 06	4. Aug 06	7. Aug 07	8. Nov 07	9. Jan 08	10. Apr 08	11. Jul 08
Likely to Visit Louisiana (3-5 on 5-point scale)	46.1%	50.7%	46.5%	44.7%	44.4%	43.7%	42.5%
Not Likely to Visit Louisiana (1-2 on 5-point scale)	53.9	49.3	53.5	55.3	55.6	56.3	57.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

	NATIONWIDE						
	1. Jan 06	4. Aug 06	7. Aug 07	8. Nov 07	9. Jan 08	10. Apr 08	11. Jul 08
Likely to Visit Louisiana (3-5 on 5-point scale)	35.6%	31.5%	19.0%	18.2%	23.2%	24.8%	23.5%
Not Likely to Visit Louisiana (1-2 on 5-point scale)	64.4	68.5	81.0	81.8	76.8	75.2	76.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0

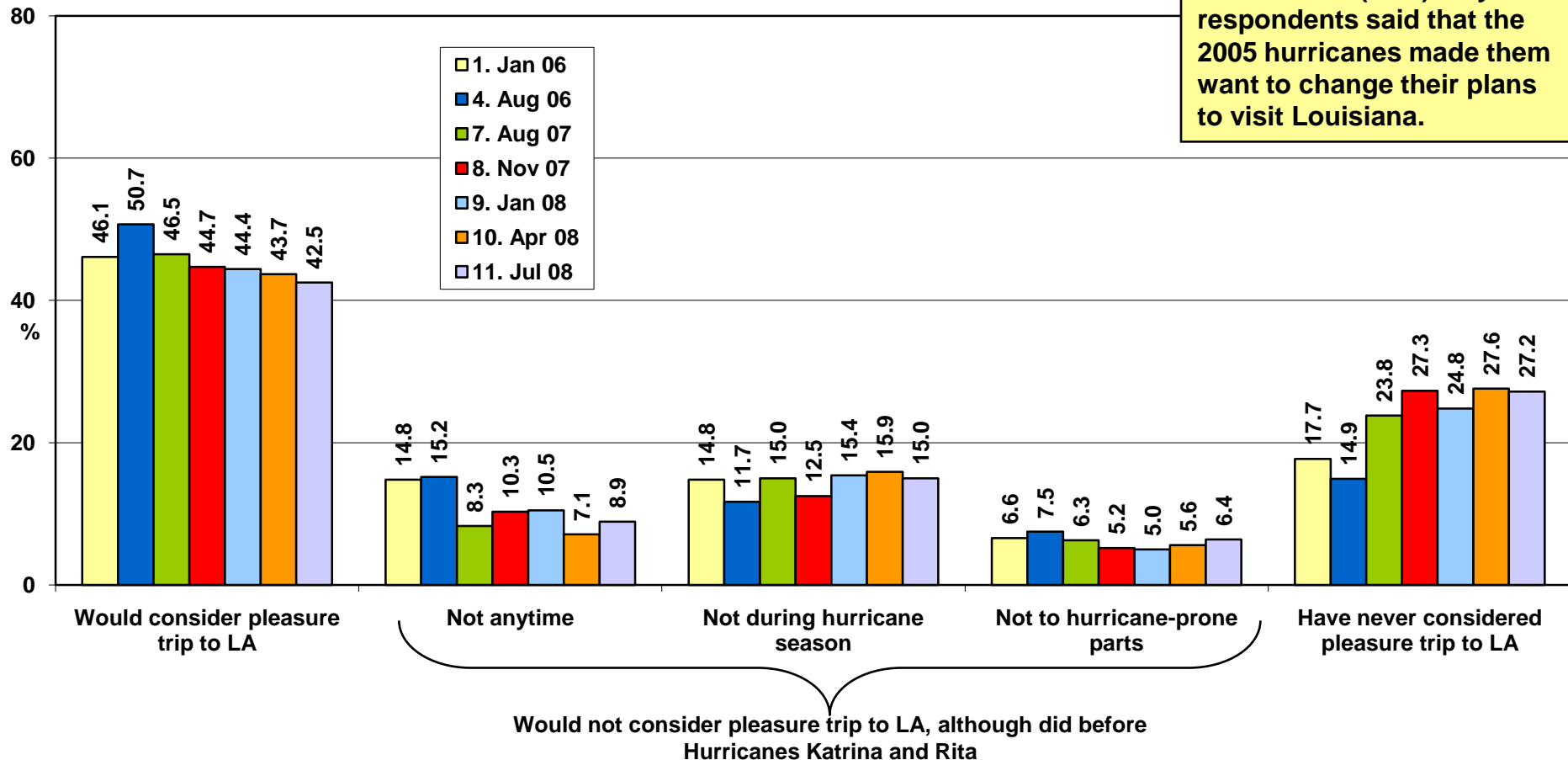
Total may not sum to 100% due to rounding

 =Significantly different from July 2008 at 95% level

TOTAL KEY MARKETS

Hurricanes' Influence on Vacation Plans to Louisiana

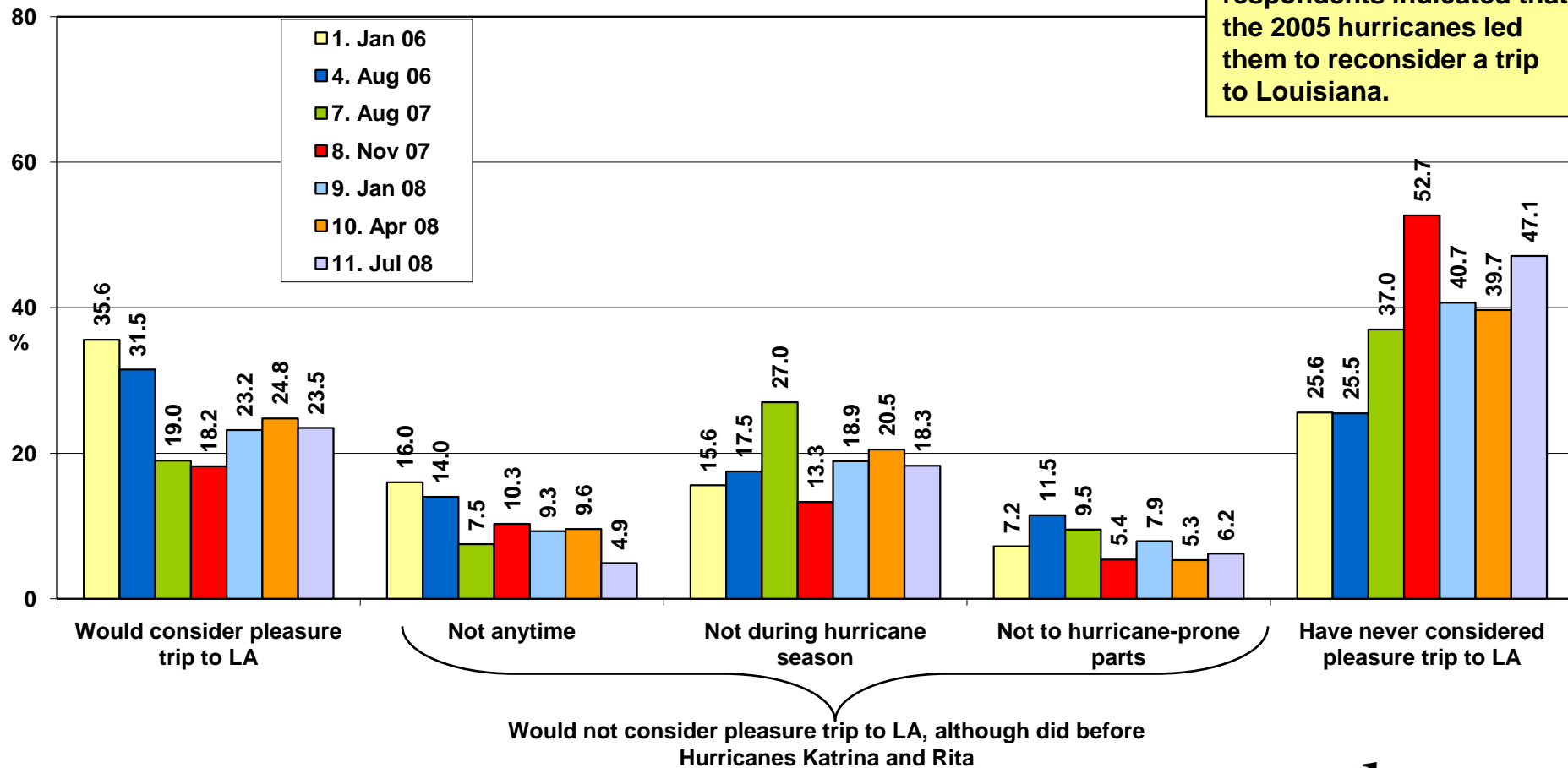
About 1 in 3 (30%) July 2008 respondents said that the 2005 hurricanes made them want to change their plans to visit Louisiana.



NATIONWIDE

Hurricanes' Influence on Vacation Plans to Louisiana

About 29% of July 2008 respondents indicated that the 2005 hurricanes led them to reconsider a trip to Louisiana.



Key Findings:

Perceptions of Louisiana among Respondents Not Likely to Visit

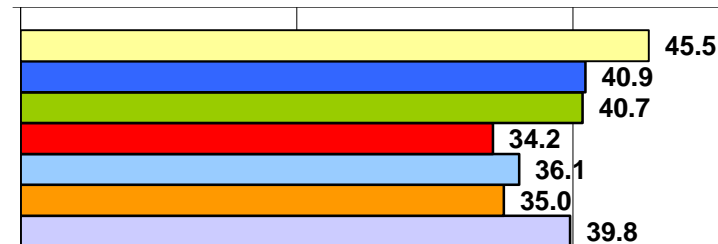
Introduction

- ◇ Respondents not likely to visit Louisiana were asked to rate their agreement with a list of reasons why they are not likely to visit:
 - A. *There are fewer hotels to choose from*
 - B. *Hotel options are not as widespread*
 - C. *Hotel prices are too high*
 - D. *Hurricanes/bad weather*
 - E. *There are better values elsewhere*
 - F. *Family and/or friends had a bad experience*
 - G. *New Orleans is where I would normally visit and New Orleans has been badly hurt by a hurricane*
(Only respondents not likely to visit Louisiana or New Orleans)

Perceptions of Louisiana among KEY MARKET Respondents Not Likely to Visit

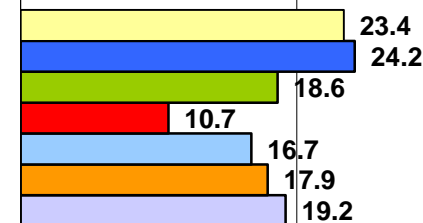
54% of Jan 06, 49% of Aug 06, 54% of Aug 07, 55% of Nov 07, 56% of Jan 08, 56% of Apr 08, 58% of July 08 Respondents

E. There are better values elsewhere

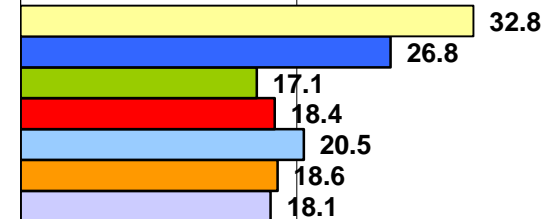


Although not significant, the perception that *hotel prices are too high* increased in 2008.

C. Hotel prices are too high



G. New Orleans is where I would visit and it's been hurt by hurricane*

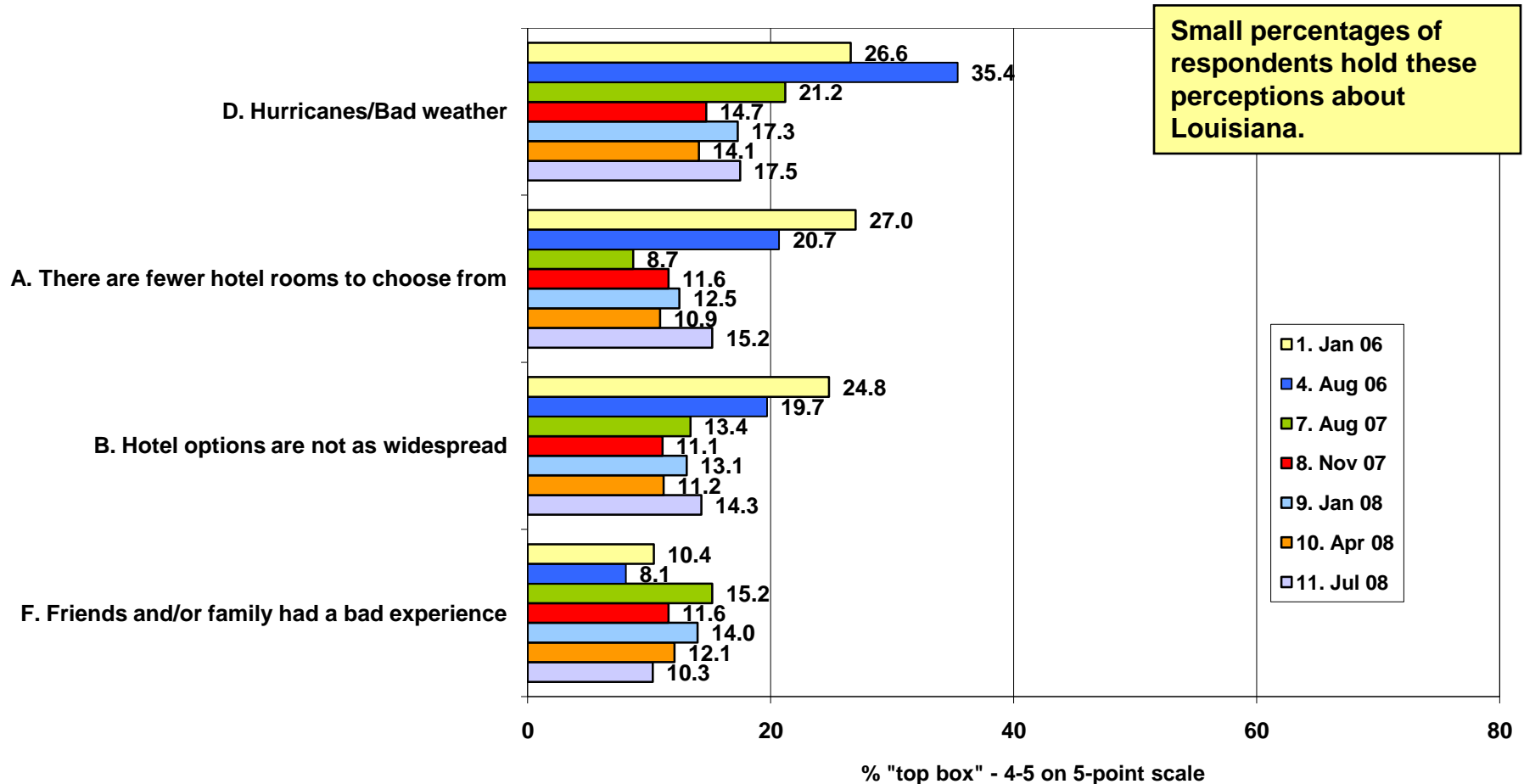


% "top box" - 4-5 on 5-point scale

*G. Only respondents not likely to visit Louisiana or New Orleans

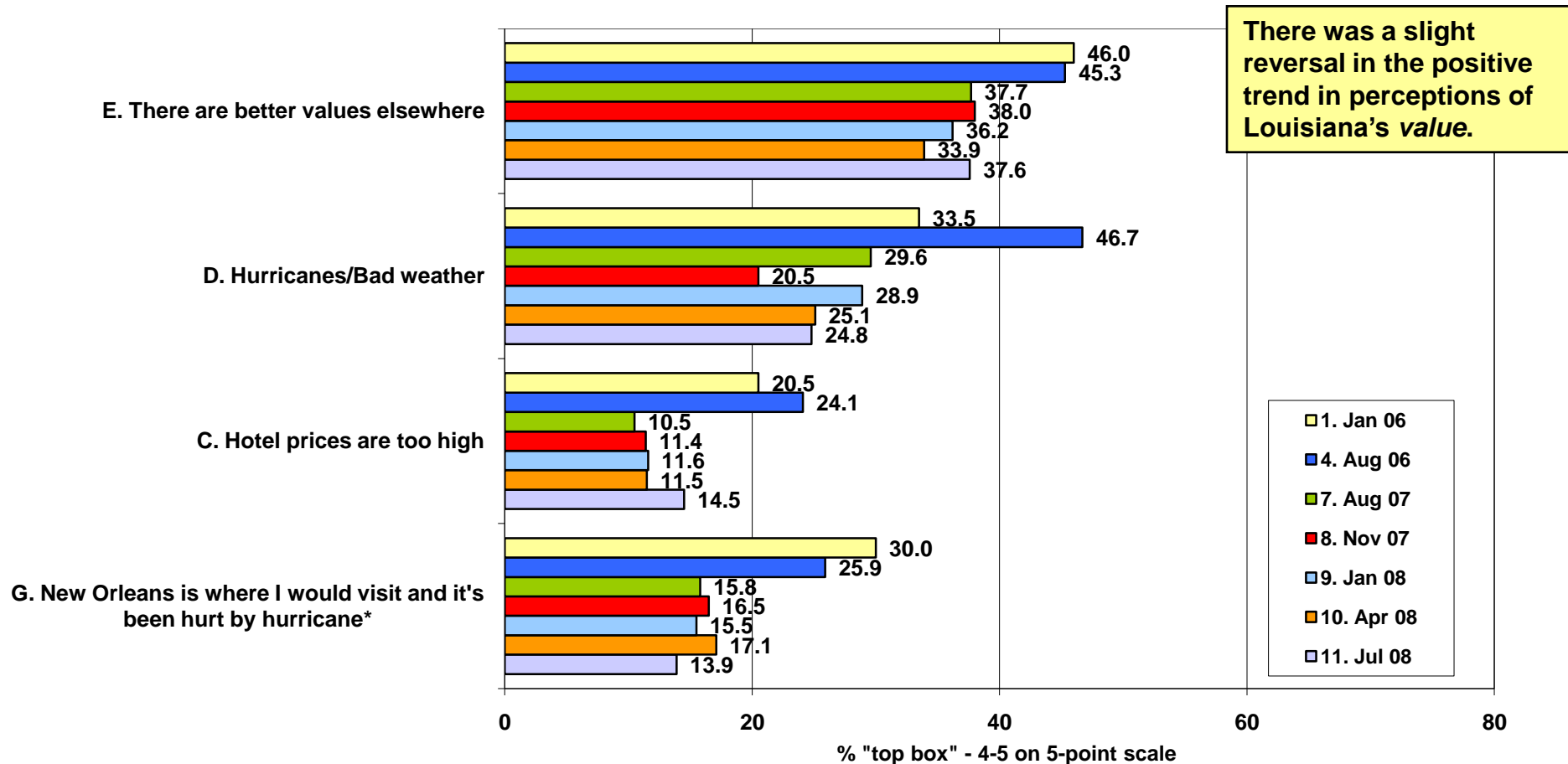
Perceptions of Louisiana among KEY MARKET Respondents Not Likely to Visit

54% of Jan 06, 49% of Aug 06, 54% of Aug 07, 55% of Nov 07, 56% of Jan 08, 56% of Apr 08, 58% of July 08 Respondents



Perceptions of Louisiana among NATIONWIDE Respondents Not Likely to Visit

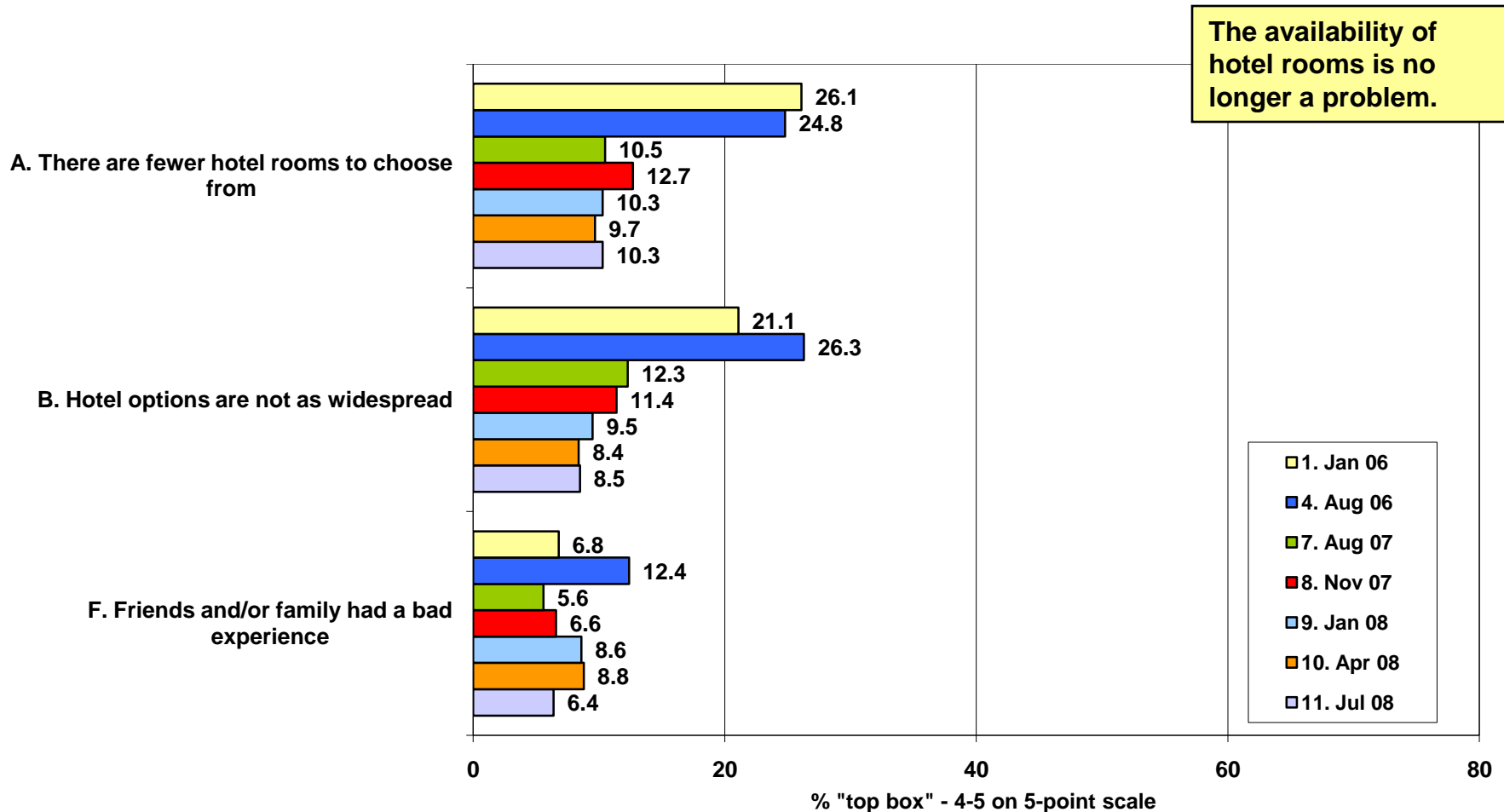
64% of Jan 06, 69% of Aug 06, 81% of Aug 07, 82% of Nov 07, 77% of Jan 08, 75% of Apr 08, 77% of July 08 Respondents



*G. Only respondents not likely to visit Louisiana or New Orleans

Perceptions of Louisiana among NATIONWIDE Respondents Not Likely to Visit

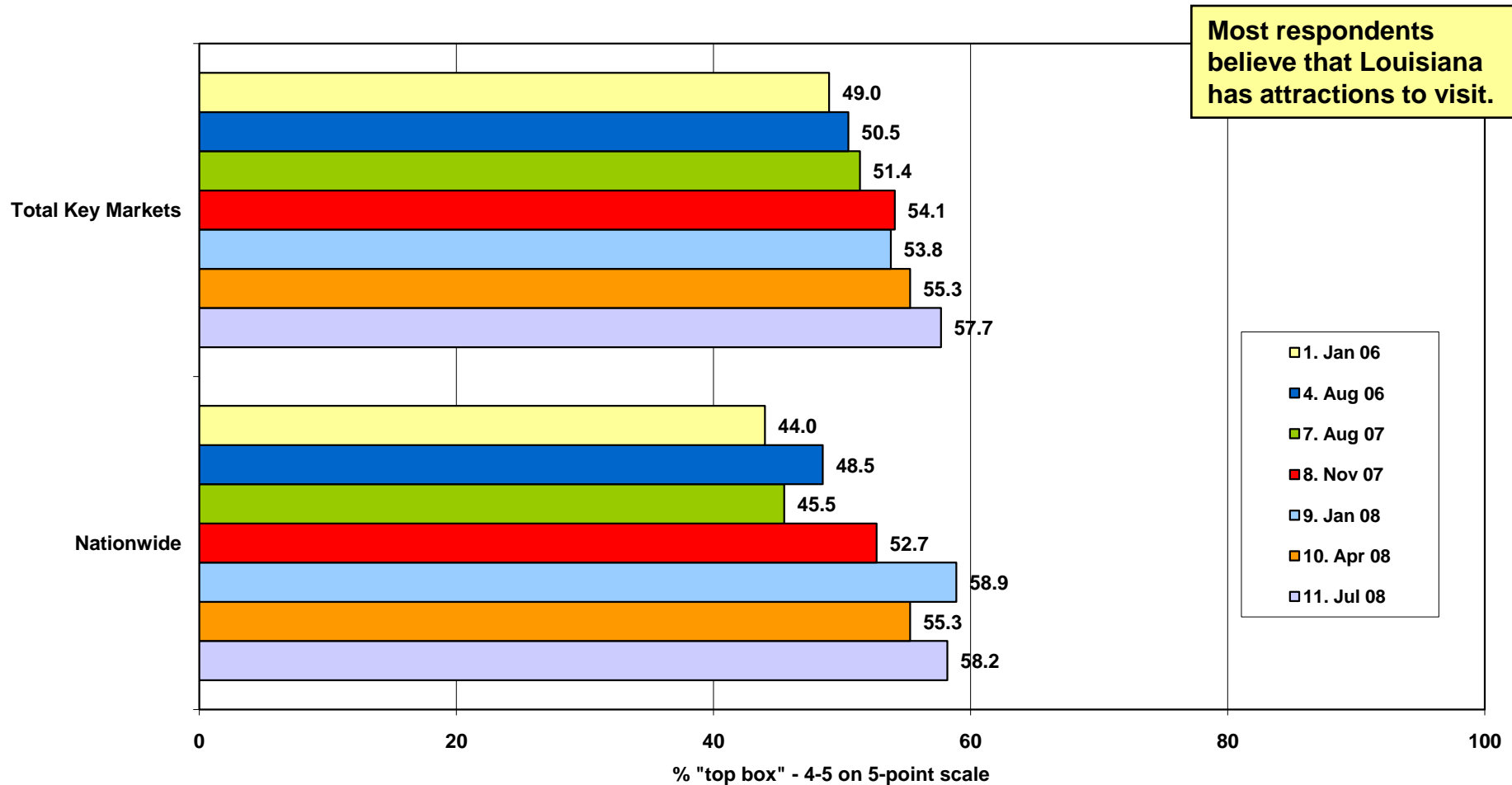
64% of Jan 06, 69% of Aug 06, 81% of Aug 07, 82% of Nov 07, 77% of Jan 08, 75% of Apr 08, 77% of July 08 Respondents



Key Findings: Agreement with Statements about Visiting Louisiana

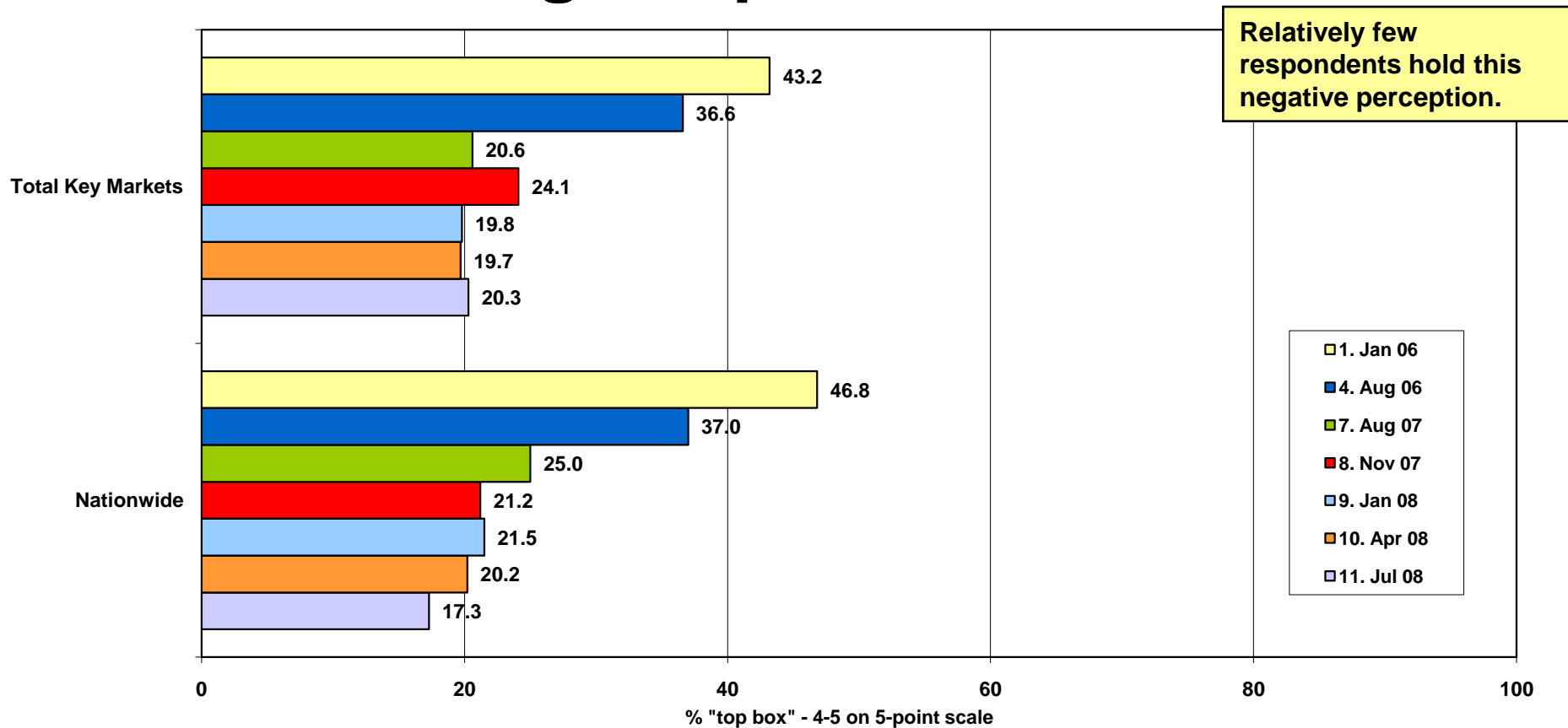
TOTAL KEY MARKETS AND NATIONWIDE

Agreement with: Louisiana still has many areas/attractions to visit



TOTAL KEY MARKETS AND NATIONWIDE

Agreement with: There are many places that have been destroyed and Louisiana is not a good place to visit now

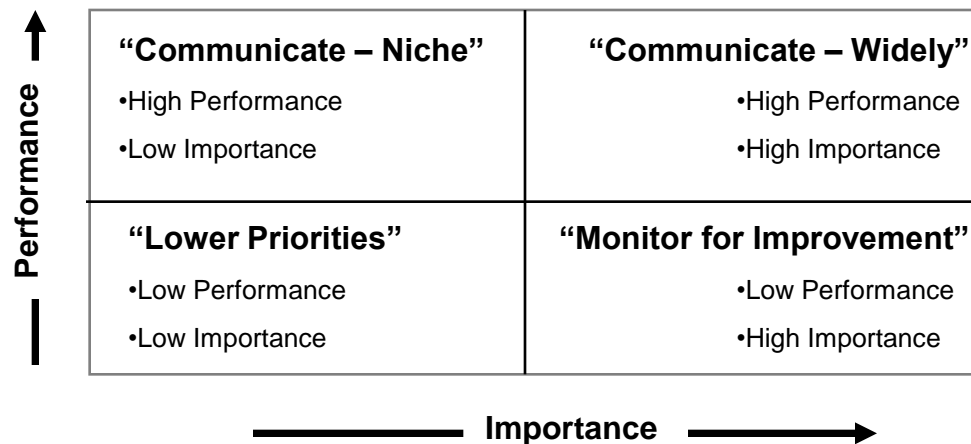


Key Findings:

Importance and Performance

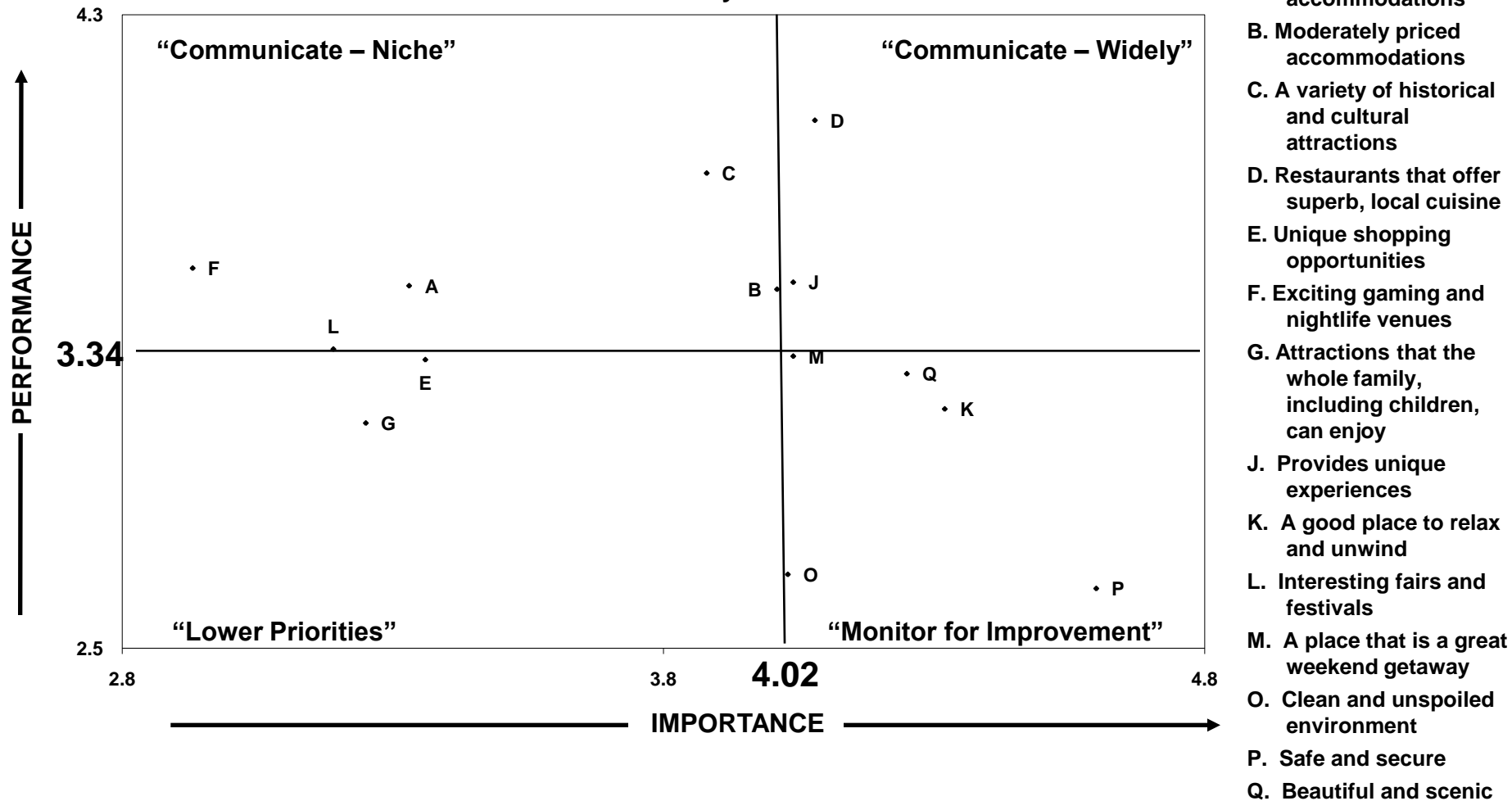
Introduction

- ◇ Average Importance and Performance scores were used to map the attributes (presented previously) into a four-quadrant grid; Importance is the horizontal axis and Performance is the vertical axis. As attributes move from left to right, Importance moves from low to high. As attributes move from bottom to top, Performance moves from low to high. The lines drawn down the center and from left to right are the median scores for Importance and Performance.
- ◇ The grid below shows the 4 types of attributes: “Monitor for Improvement,” “Communicate – Widely,” “Communicate – Niche,” and “Lower Priorities.”
 - ❖ Attributes that are high Importance, low Performance are labeled, “Monitor for Improvement.”
 - ❖ Attributes that are high Importance, high Performance are labeled, “Communicate – Widely.”
 - ❖ Attributes that are low Importance, high Performance are labeled, “Communicate – Niche.”
 - ❖ Attributes that are low Importance, low Performance are labeled, “Lower Priorities.”



Importance/Performance of Louisiana among KEY MARKET Respondents

(Atlanta, Houston, Dallas, Pensacola, Memphis, Jackson, Mobile, Birmingham)
July 2008

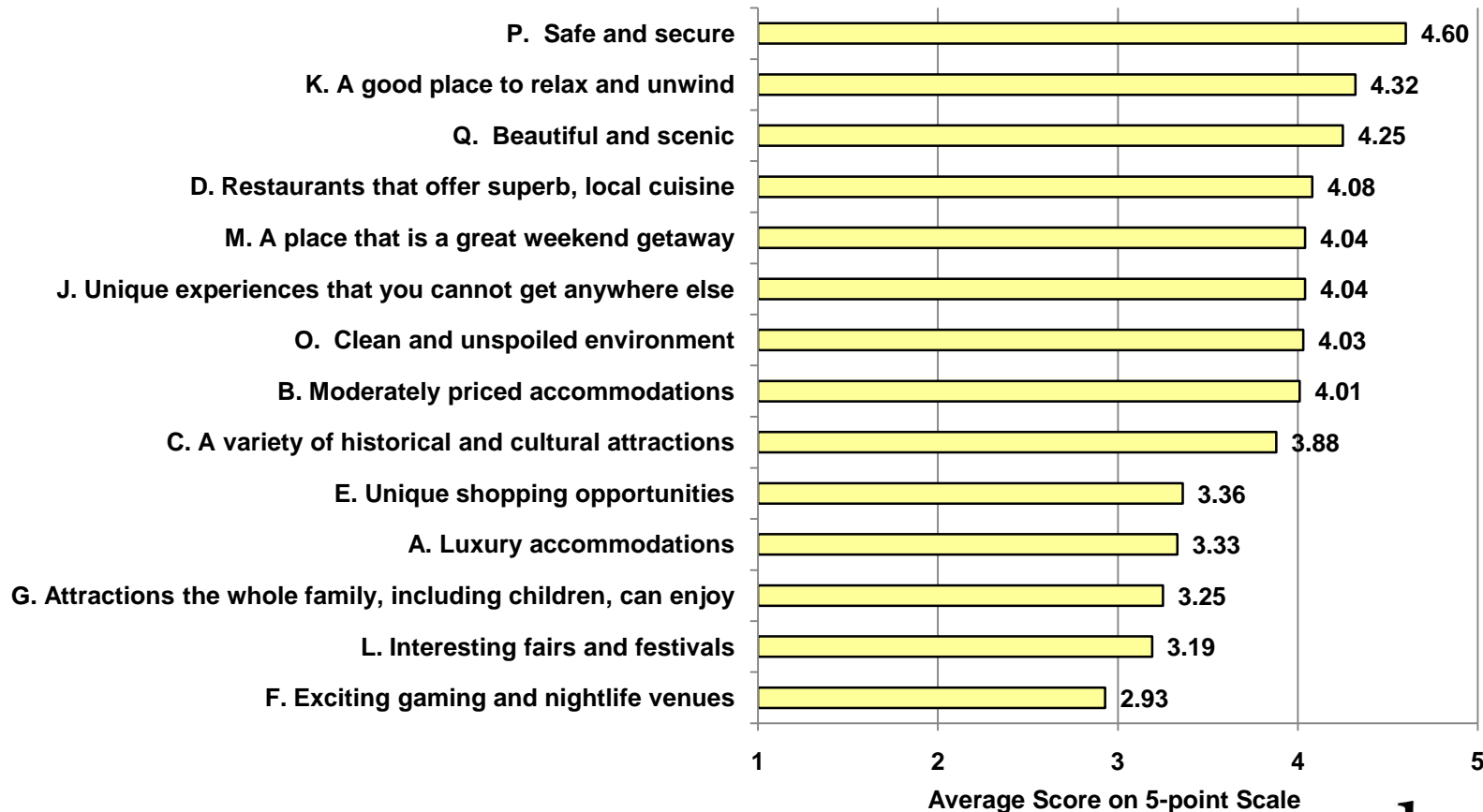


TOTAL KEY MARKETS

Importance of Leisure Travel Attributes

July 2008

Respondents stated that *Safety* is extremely important.

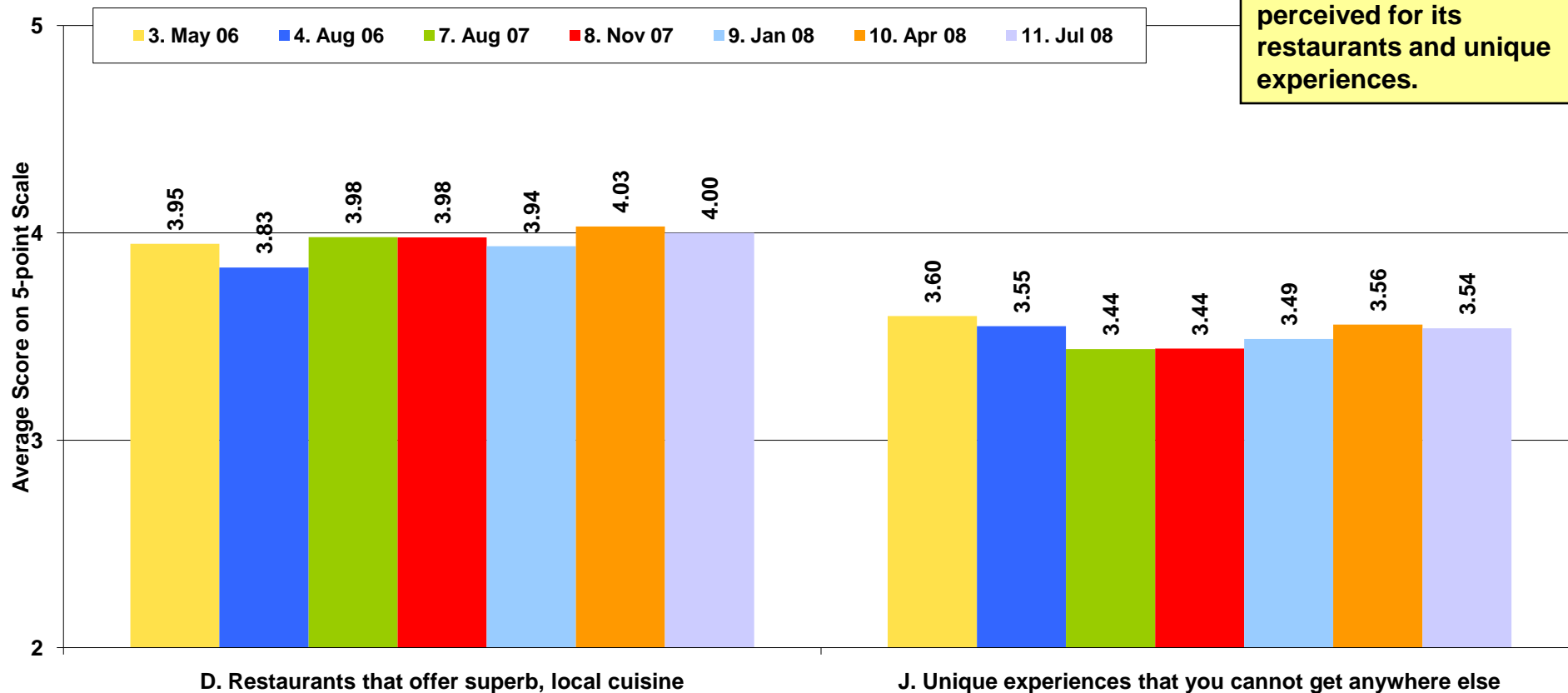


TOTAL KEY MARKETS

Louisiana's Performance on Attributes to COMMUNICATE WIDELY

Attributes Of High Importance, High Performance

Louisiana is positively perceived for its restaurants and unique experiences.

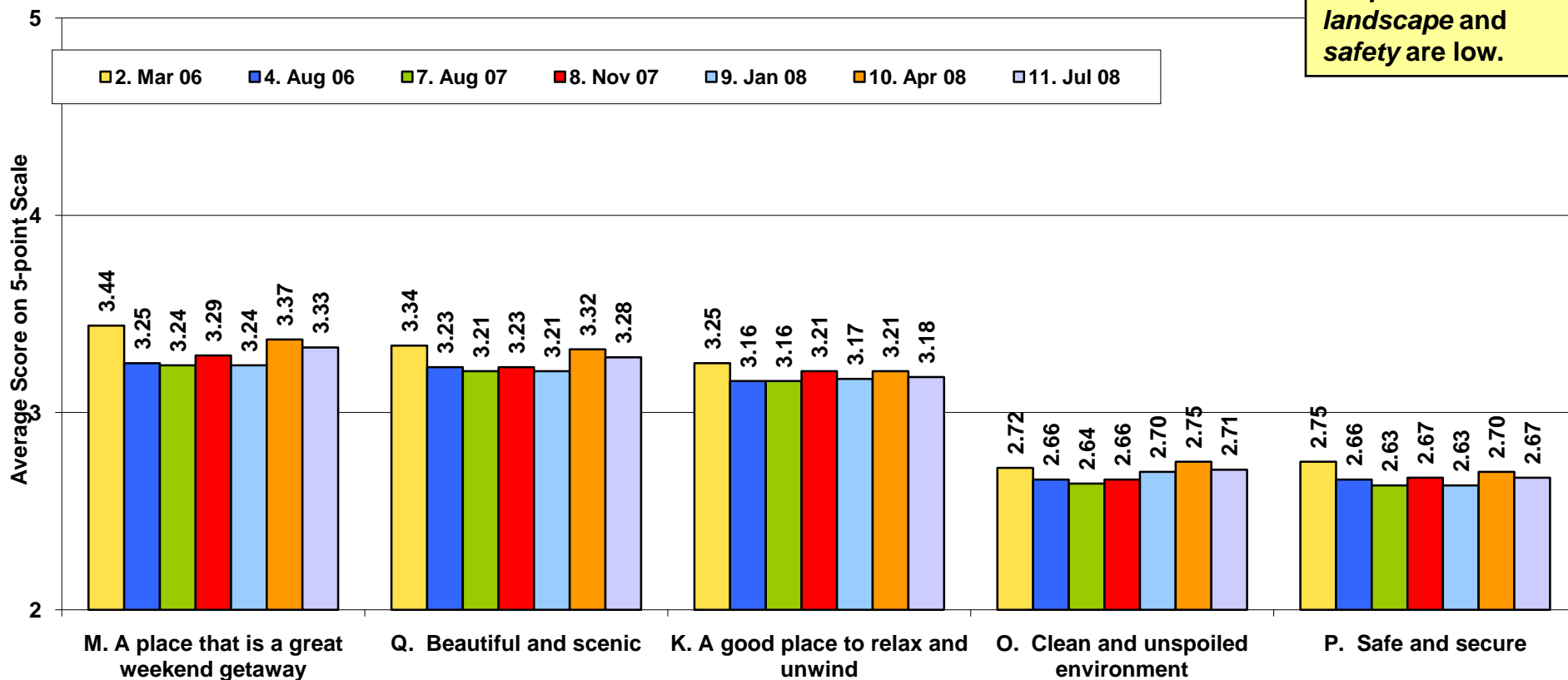


TOTAL KEY MARKETS

Louisiana's Performance on Attributes to MONITOR FOR IMPROVEMENT

Attributes Of High Importance, Low Performance

Perceptions of an *unspoiled landscape and safety* are low.

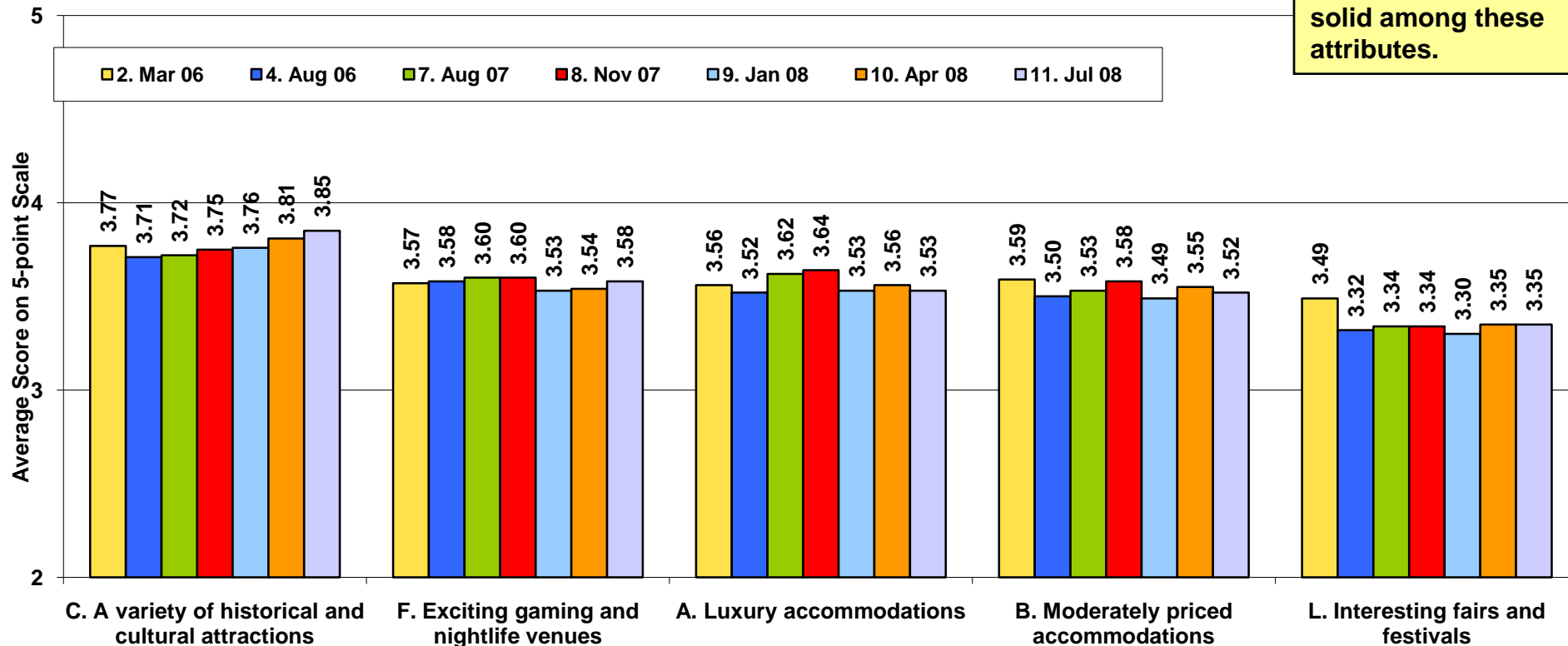


TOTAL KEY MARKETS

Louisiana's Performance on Attributes to COMMUNICATE NICHE

Attributes Of Low Importance, High Performance

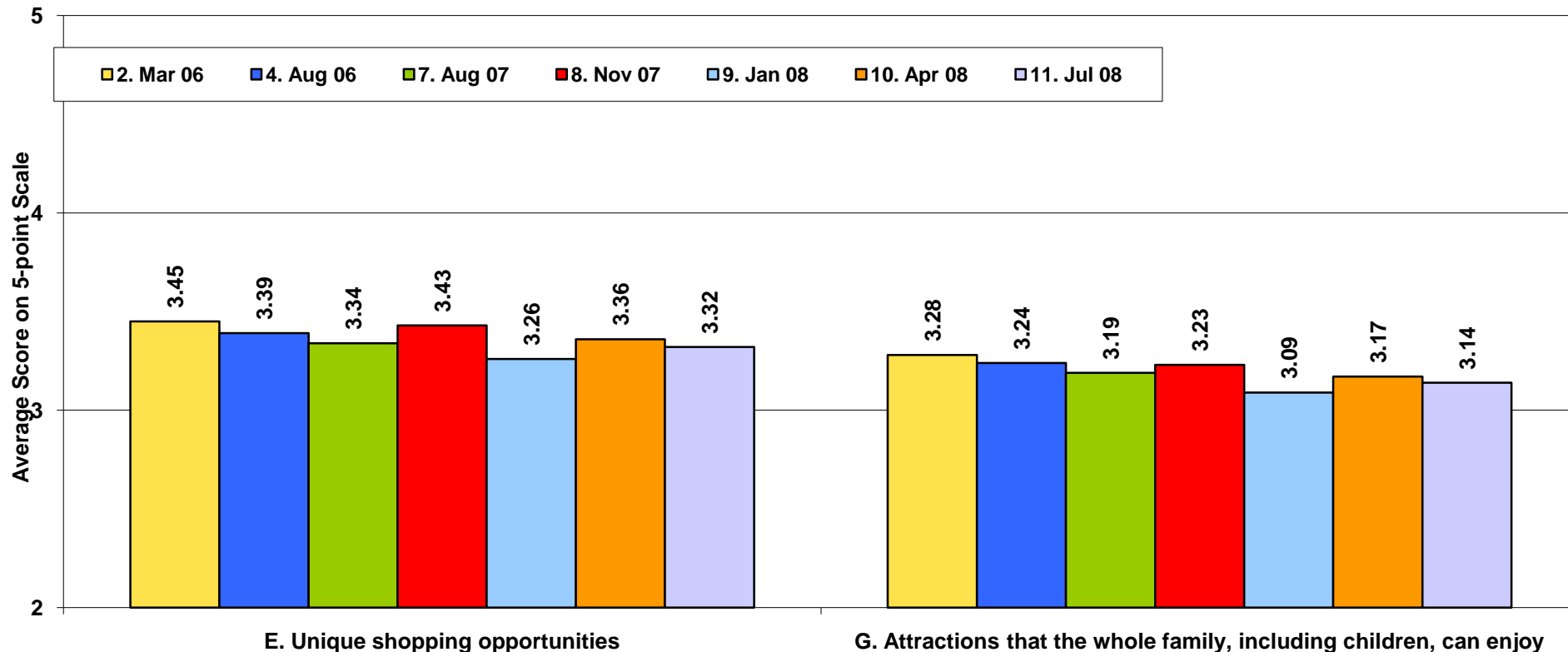
Louisiana's performance is solid among these attributes.



TOTAL KEY MARKETS

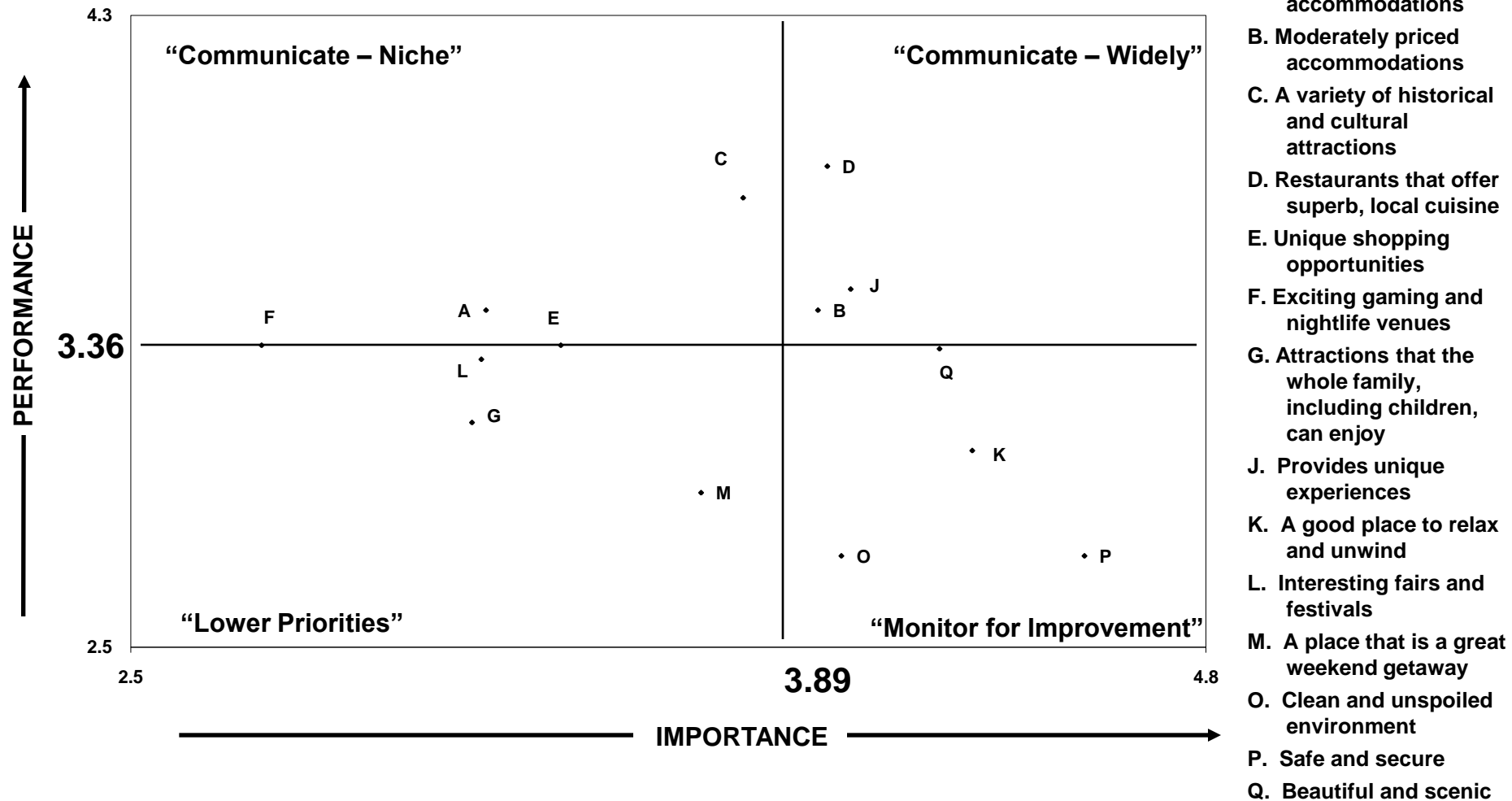
Louisiana's Performance on Attributes that are LOWER PRIORITIES

Attributes Of Low Importance, Low Performance



Importance/Performance of Louisiana among NATIONWIDE Respondents

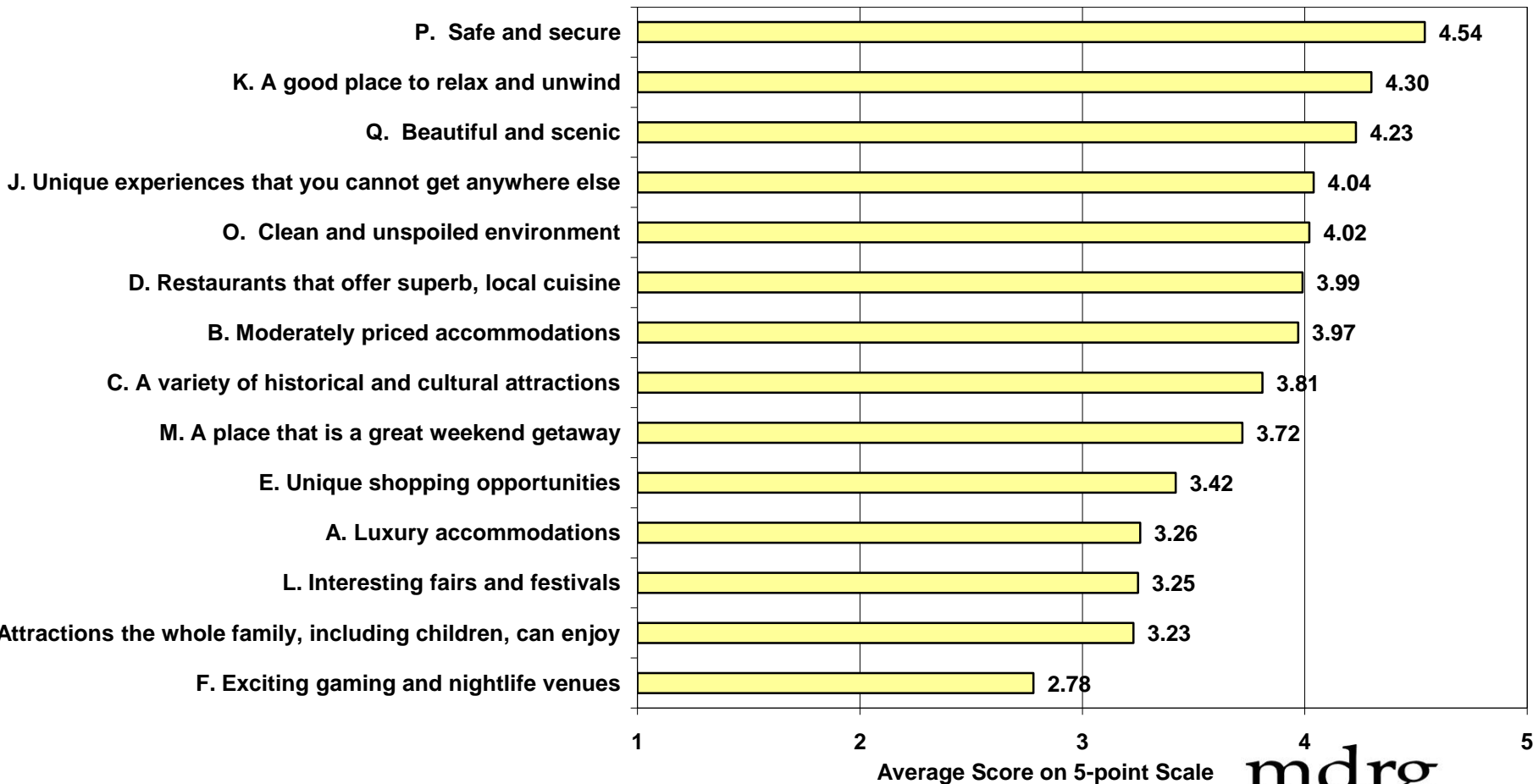
July 2008



NATIONWIDE Importance of Leisure Travel Attributes

July 2008

Perceptions of *Safety* rank highest in importance.

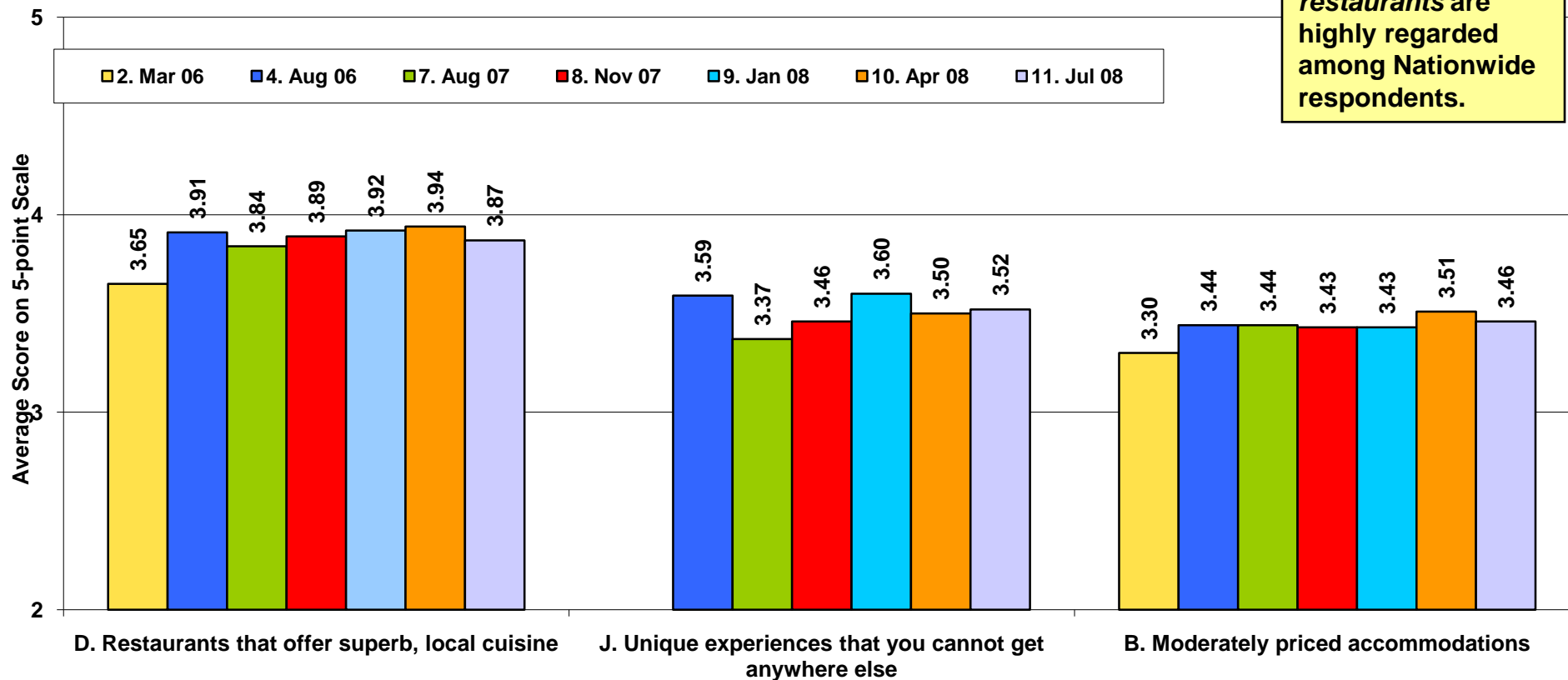


NATIONWIDE

Louisiana's Performance on Attributes to COMMUNICATE WIDELY

Attributes Of High Importance, High Performance

Louisiana's
restaurants are
highly regarded
among Nationwide
respondents.

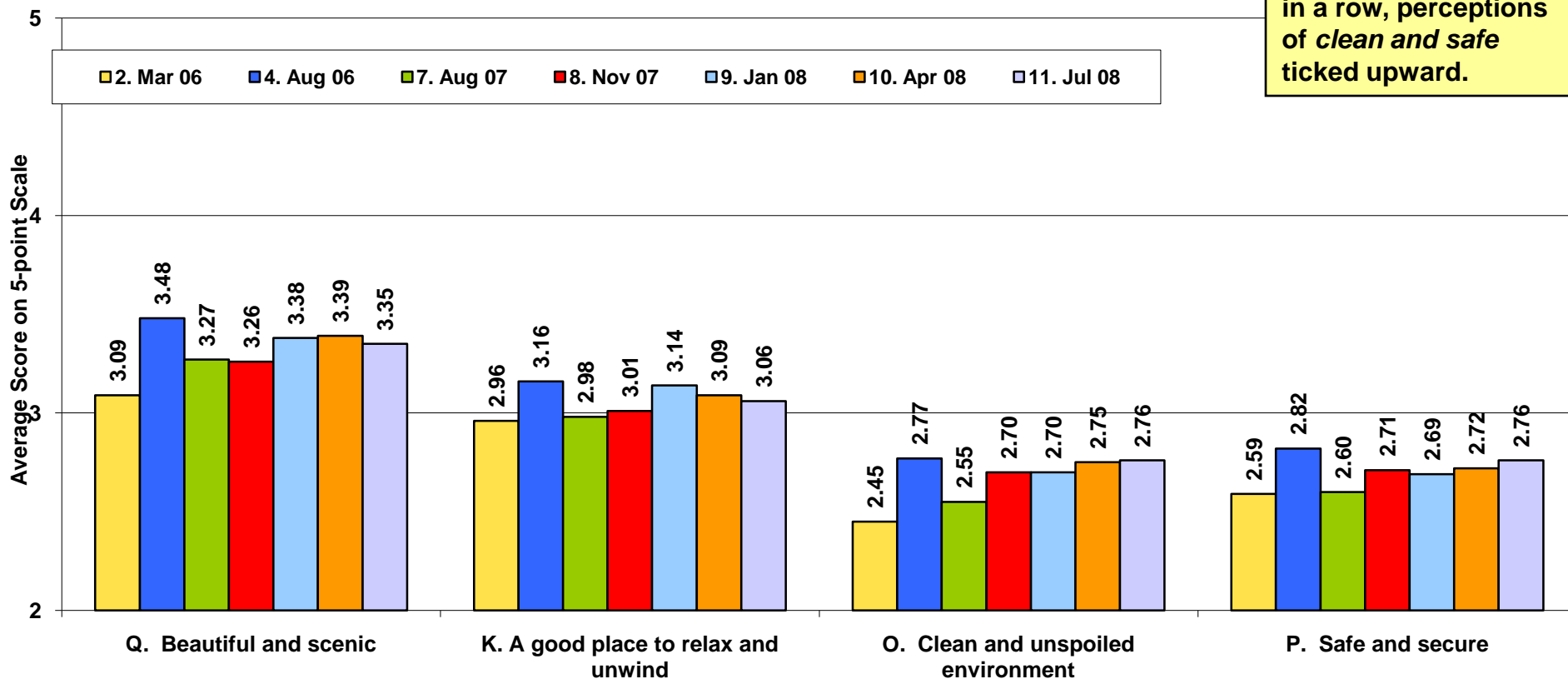


NATIONWIDE

Louisiana's Performance on Attributes to MONITOR FOR IMPROVEMENT

Attributes Of High Importance, Low Performance

For the second wave in a row, perceptions of *clean and safe* ticked upward.

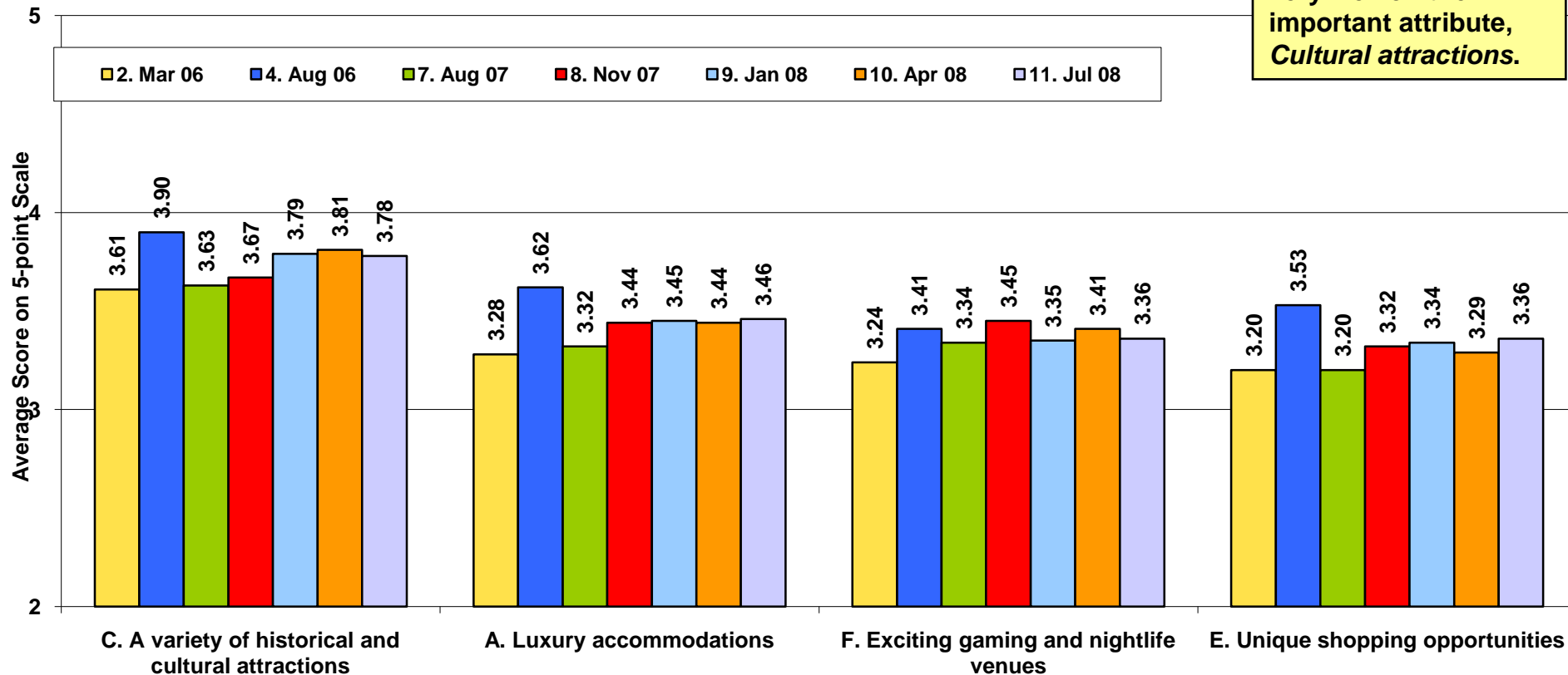


NATIONWIDE

Louisiana's Performance on Attributes to COMMUNICATE NICHE

Attributes Of Low Importance, High Performance

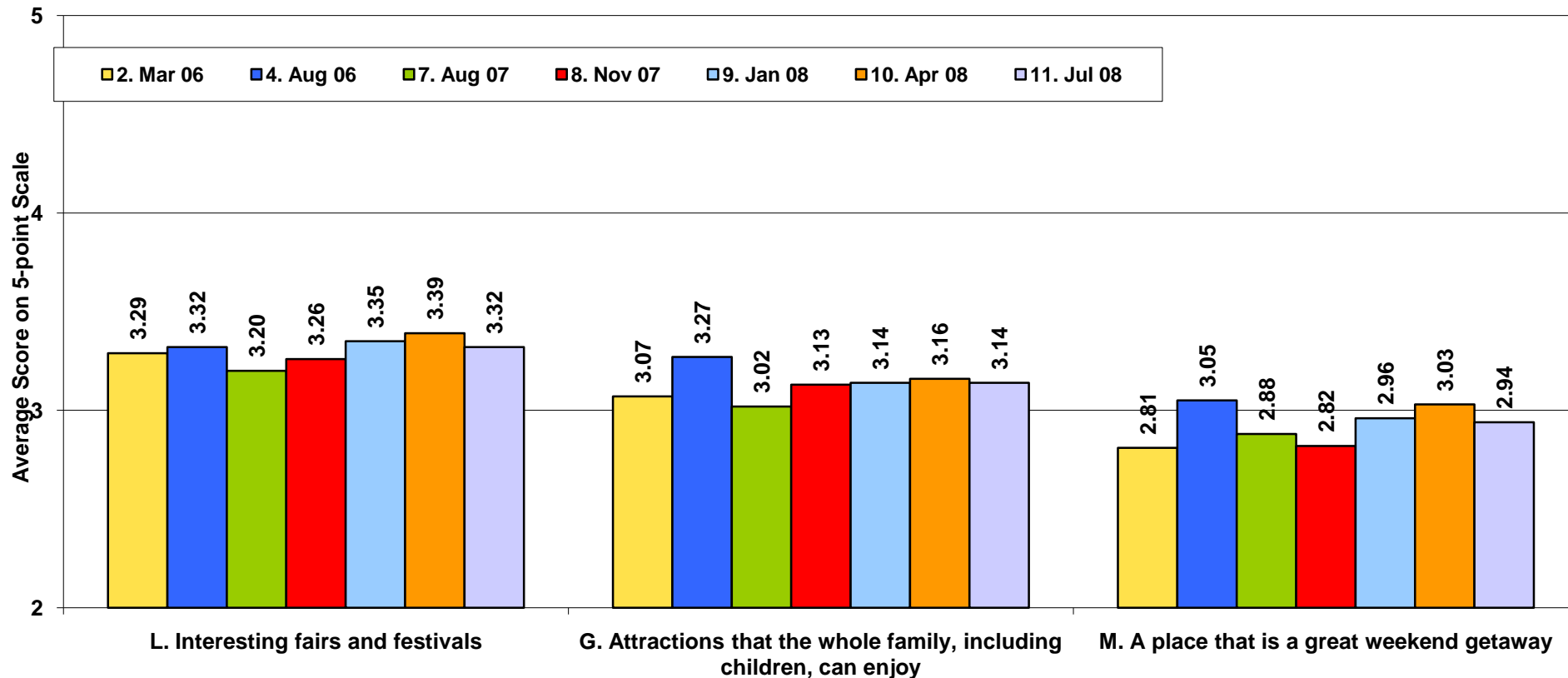
Louisiana performs very well on the important attribute, *Cultural attractions*.



NATIONWIDE

Louisiana's Performance on Attributes that are LOWER PRIORITIES

Attributes Of Low Importance, Low Performance

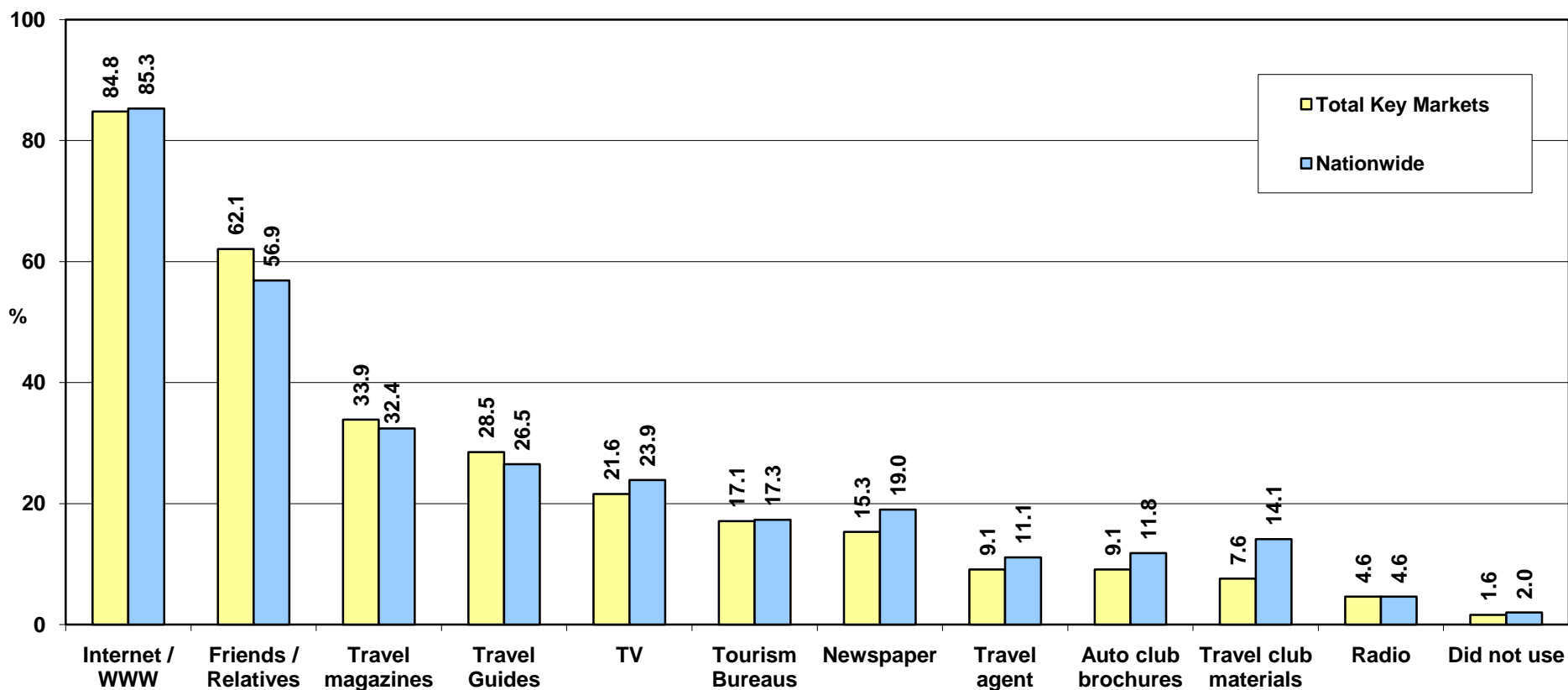


Respondent Travel Profile

TOTAL KEY MARKETS AND NATIONWIDE

Source Ever Used for Planning Leisure Trips

July 2008

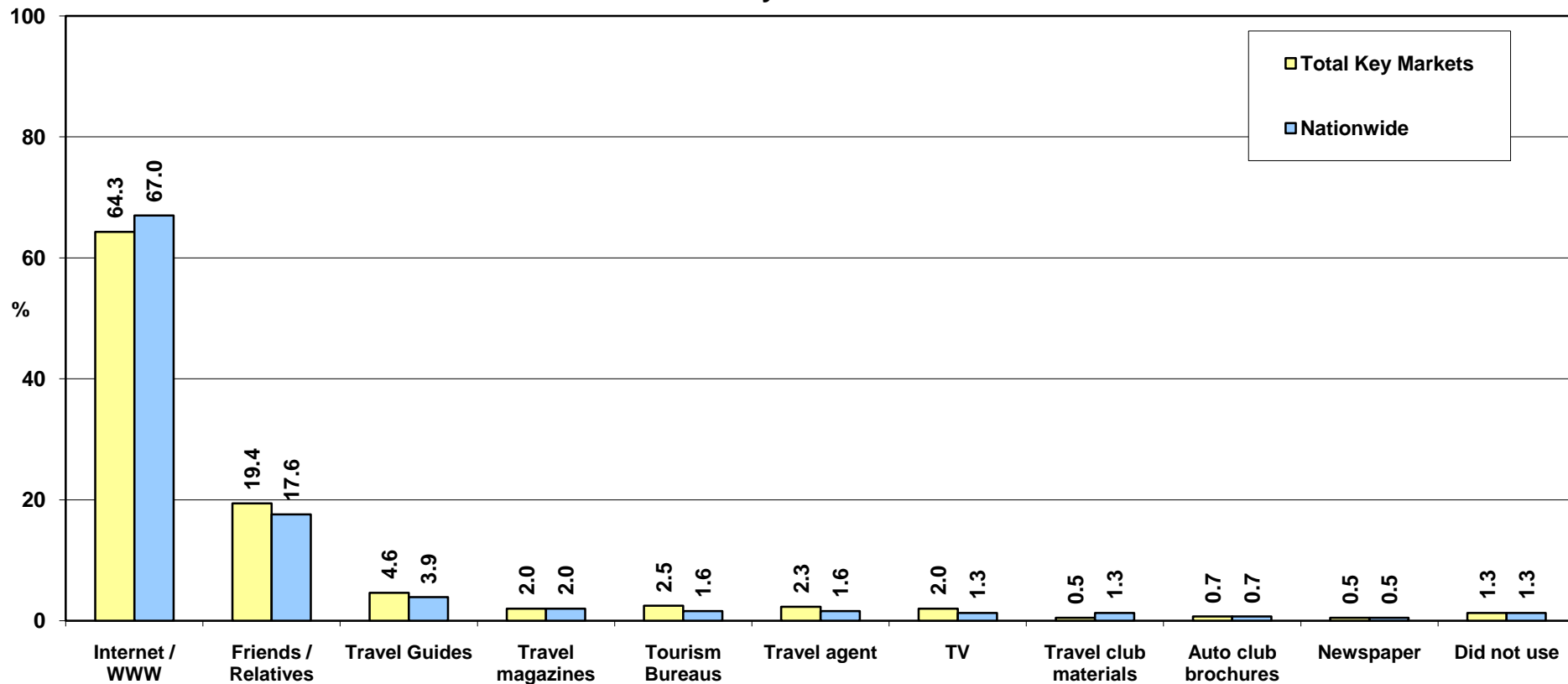


Multiple responses allowed

TOTAL KEY MARKETS AND NATIONWIDE

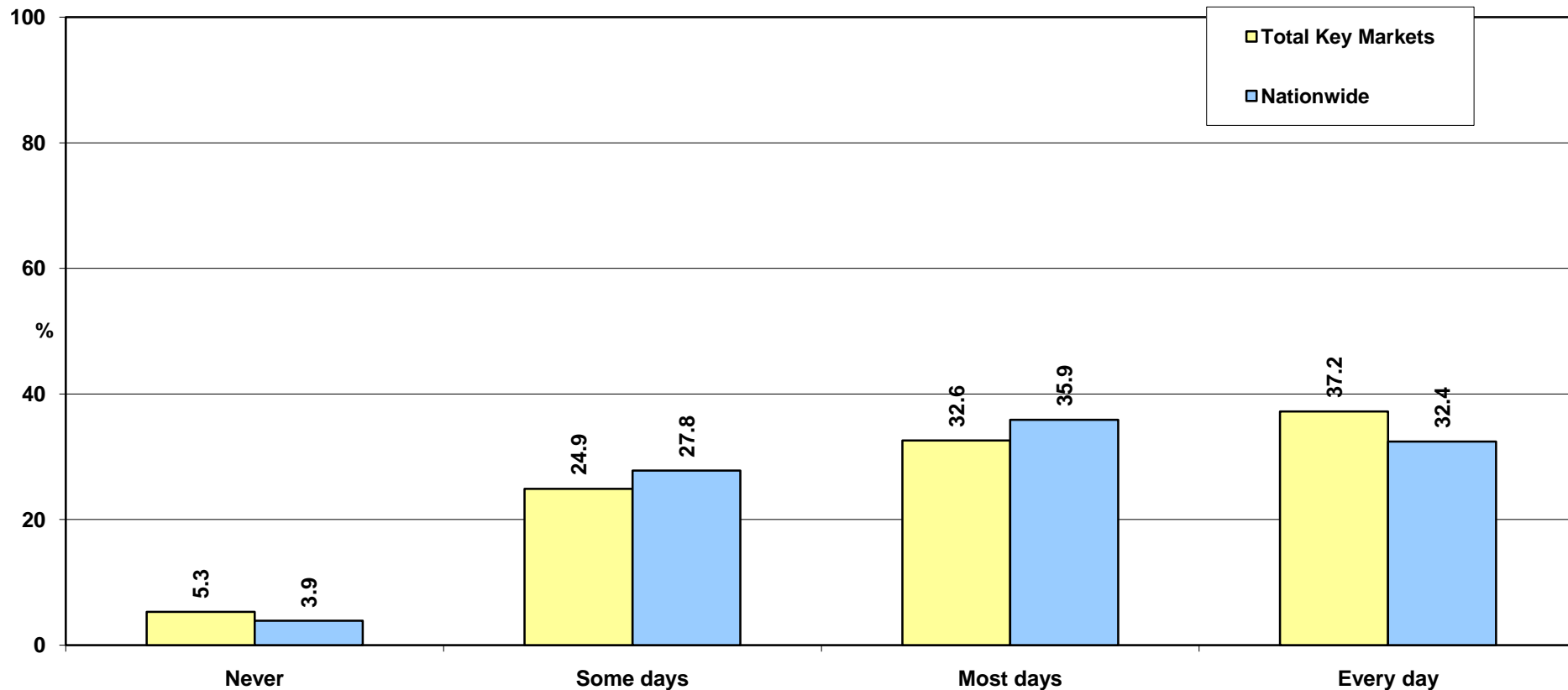
Source Most Often Used for Planning Leisure Trips

July 2008



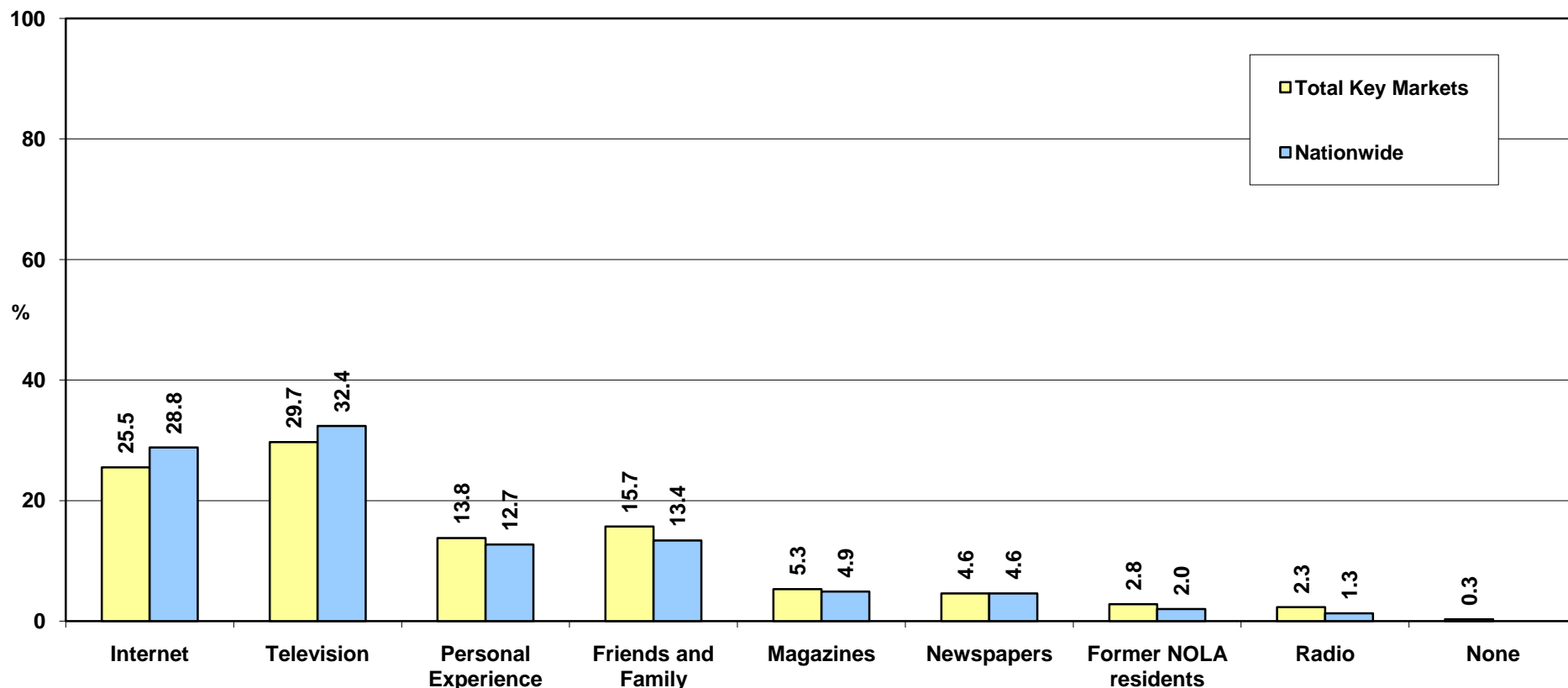
TOTAL KEY MARKETS AND NATIONWIDE Frequency of News Watching

July 2008



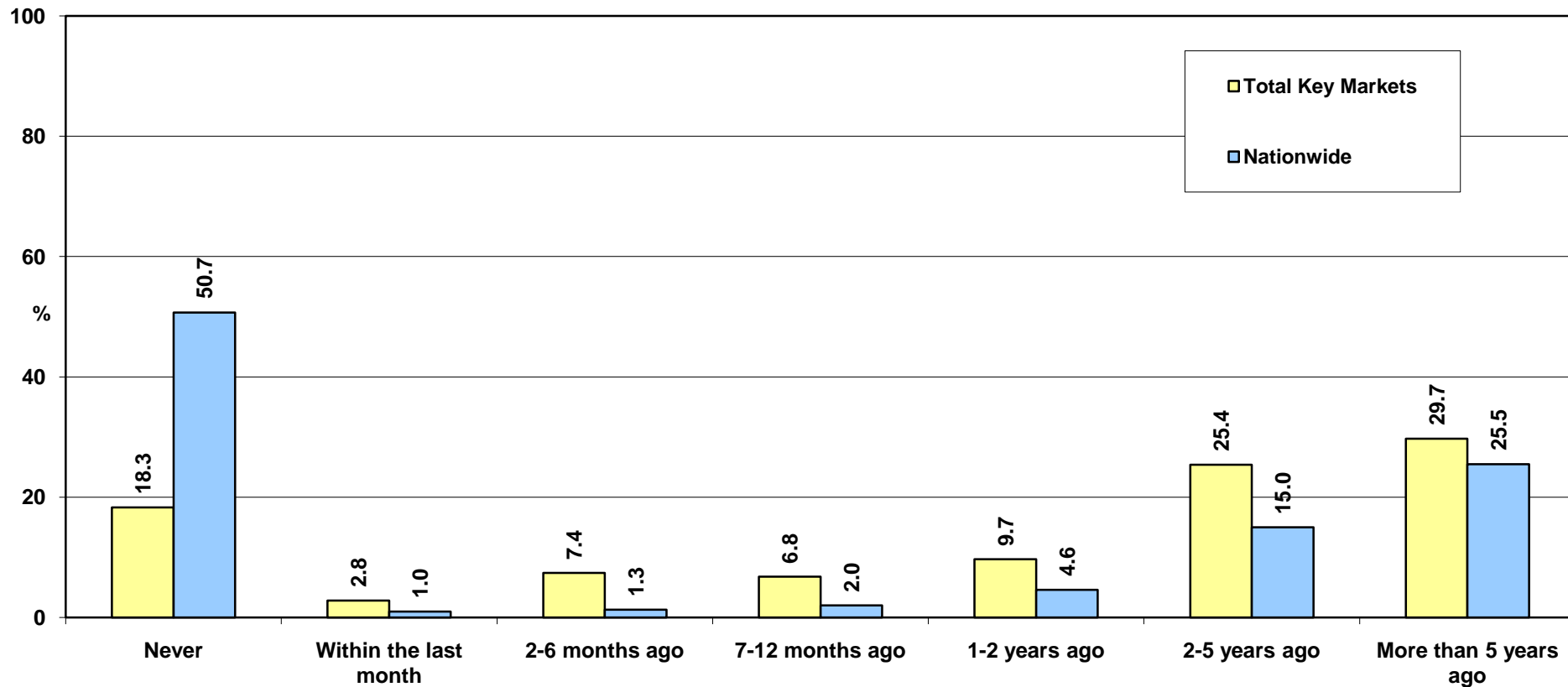
TOTAL KEY MARKETS AND NATIONWIDE Number One Source of Information about New Orleans/Louisiana

July 2008



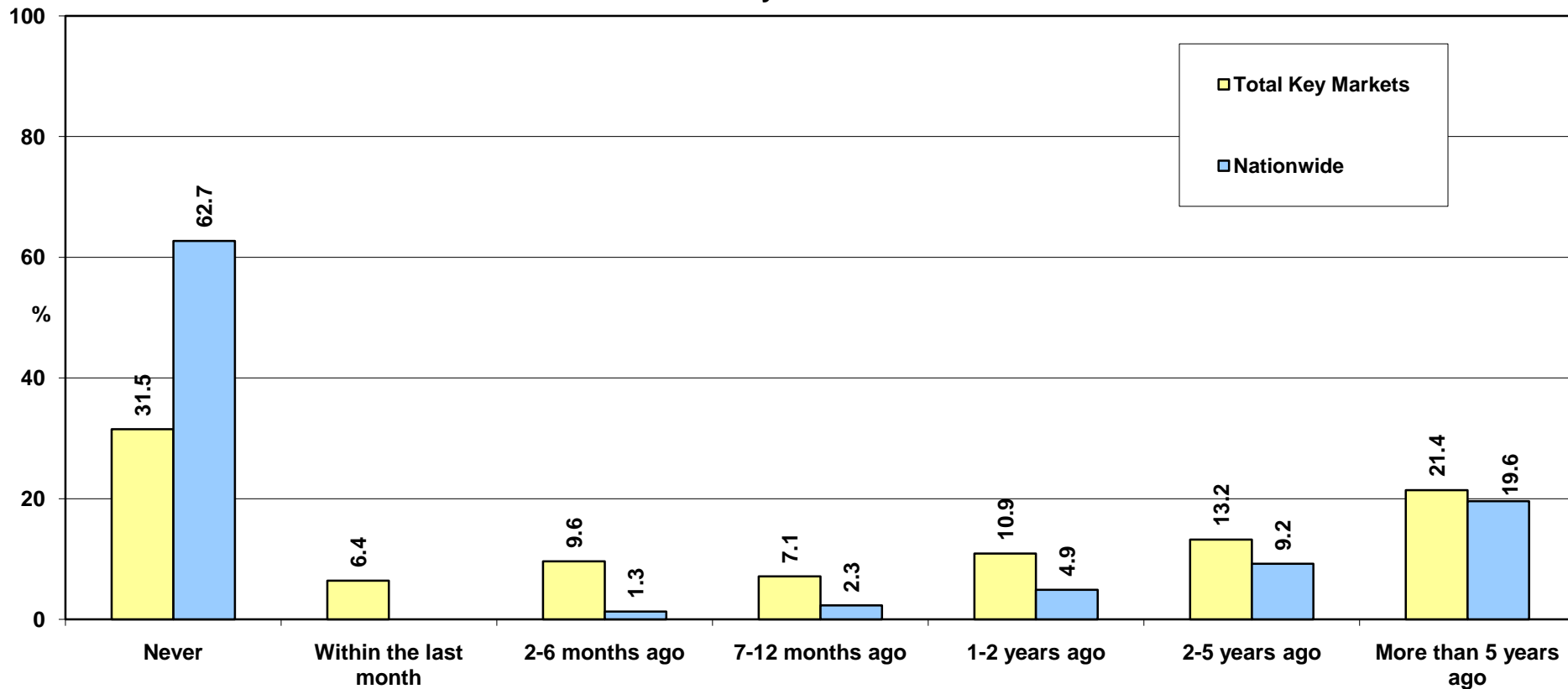
TOTAL KEY MARKETS AND NATIONWIDE Travel History to New Orleans

July 2008



TOTAL KEY MARKETS AND NATIONWIDE Travel History to Louisiana other than New Orleans

July 2008



Demographics

Demographics

July 2008

n=913

Age	%
25-34	26.6
35-44	26.9
45-54	25.5
55 or older	20.9

Race/Ethnicity	%
African American/Black	12.8
Caucasian/White	79.1
Other Race/Ethnicity	8.1

Household	%
Married/Living with Partner with Children	37.6
Married/Living with Partner w/o Children	42.6
Single with or without Children	19.8

Income	%
\$50k to less than \$75k	25.0
\$75k to less than \$100k	27.2
\$100k to less than \$125k	23.0
\$125k or more	24.9

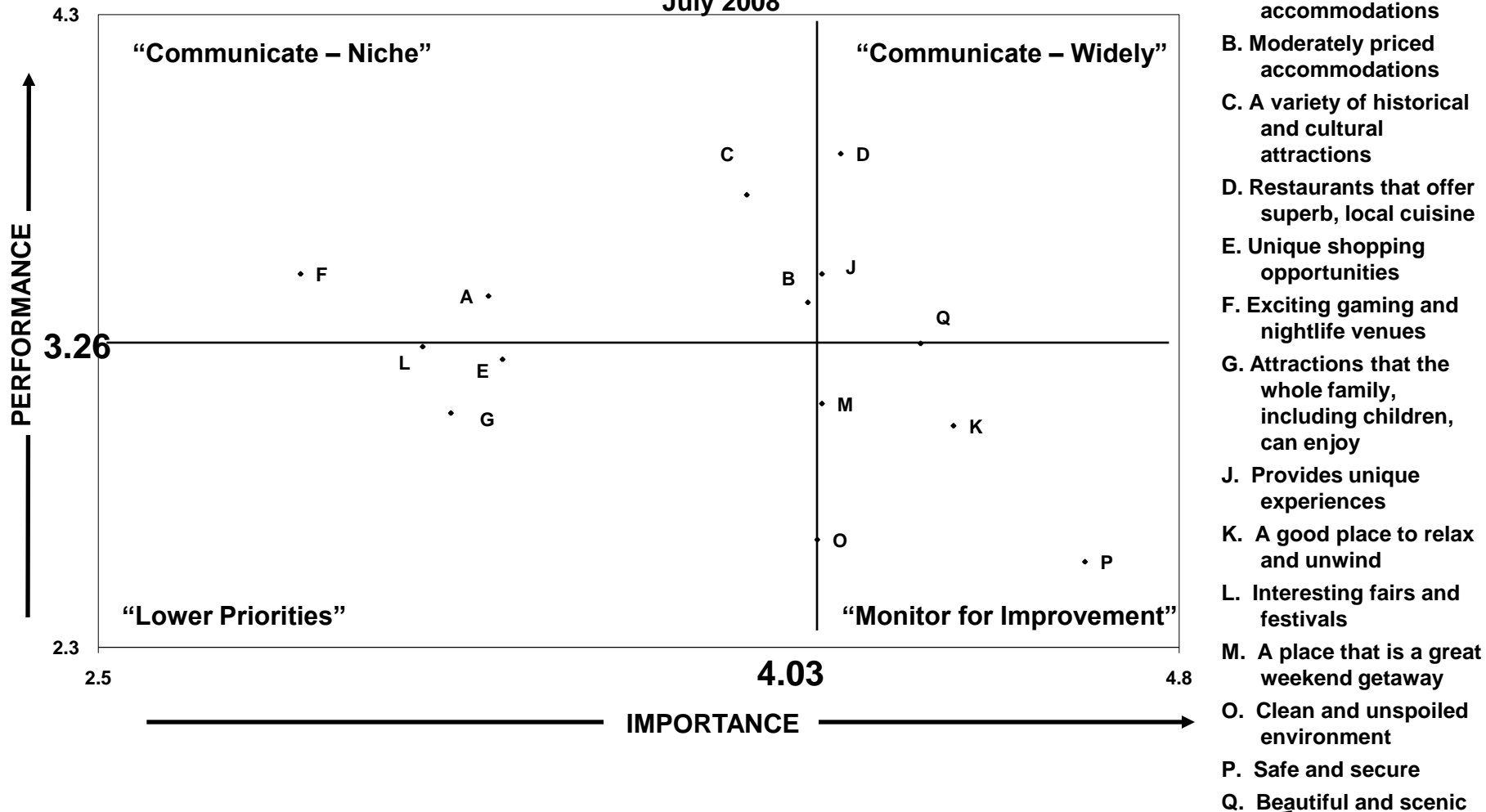
Level of Education	%
Less than College	26.5
College Graduate	41.2
Post Graduate Degree	32.3

Gender	%
Male	39.9
Female	60.1

Appendix A: Importance and Performance: Atlanta, Houston, and Other Target Markets

Importance/Performance of Louisiana among ATLANTA Respondents

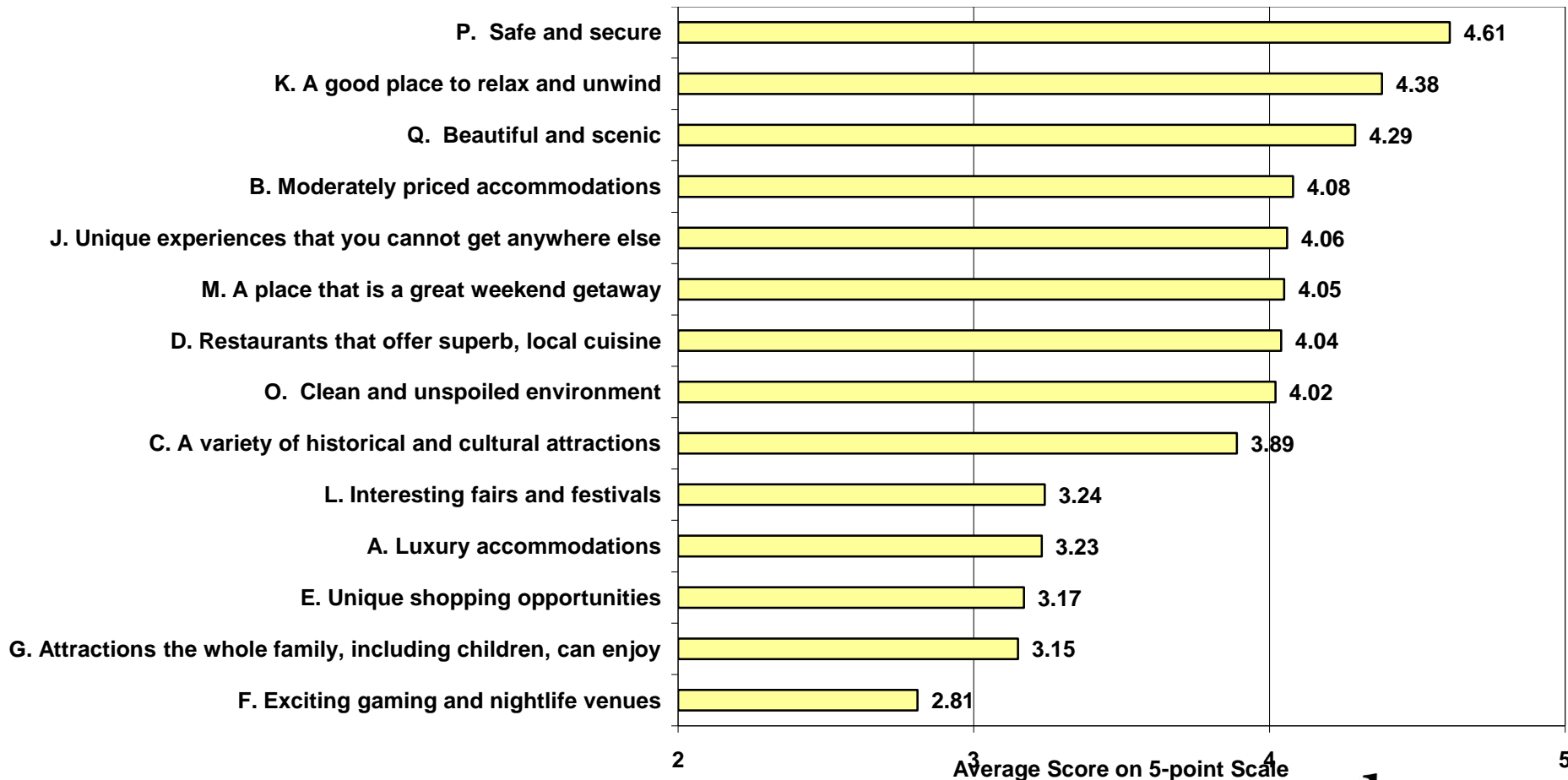
July 2008



ATLANTA

Importance of Leisure Travel Attributes

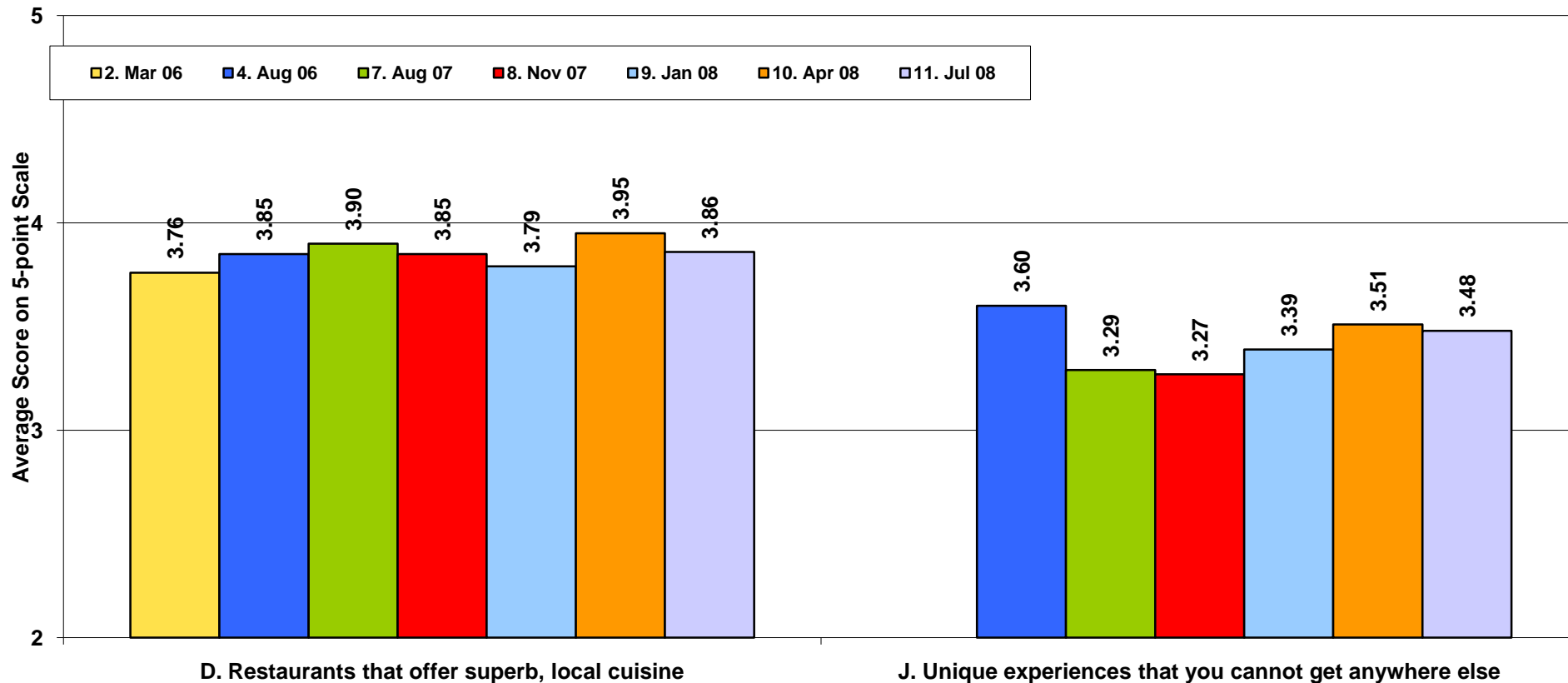
July 2008



ATLANTA

Louisiana's Performance on Attributes to COMMUNICATE WIDELY

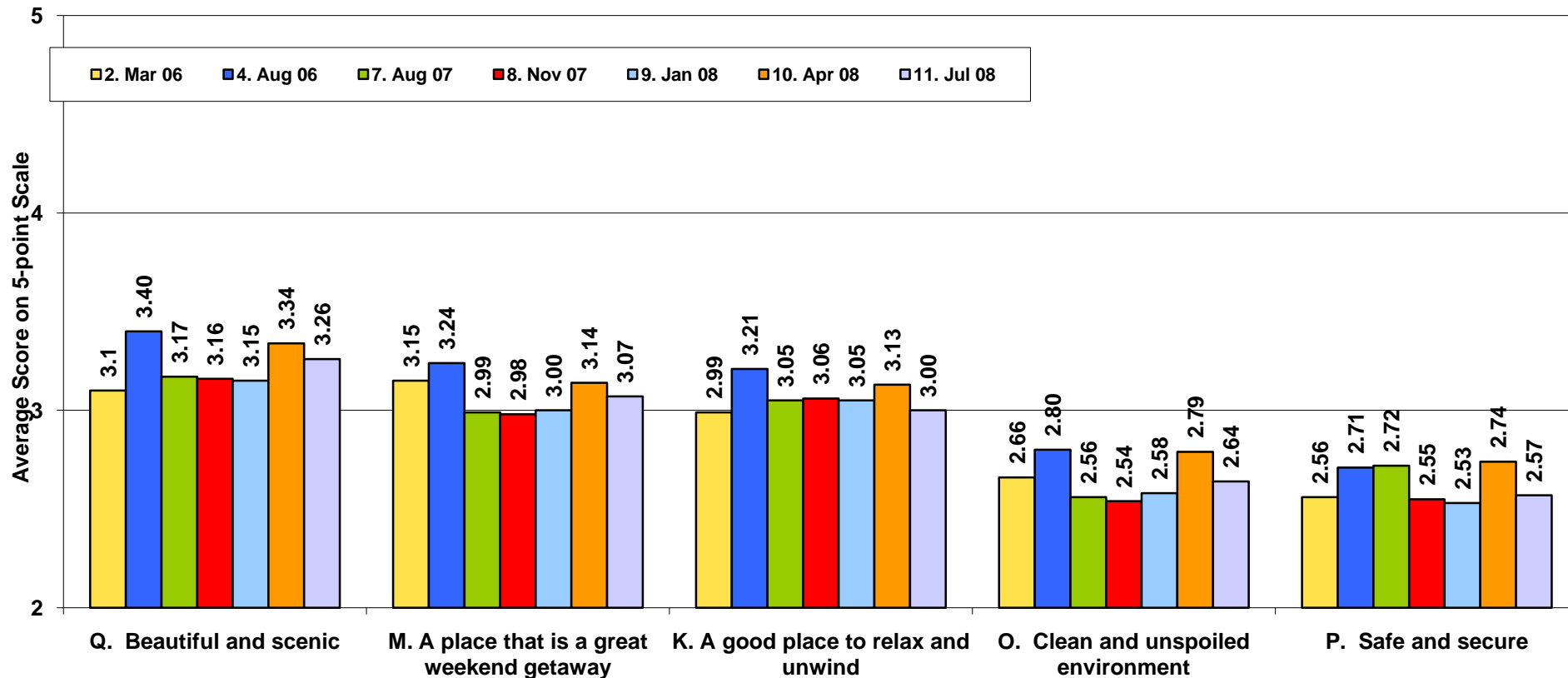
Attributes Of High Importance, High Performance



ATLANTA

Louisiana's Performance on Attributes to MONITOR FOR IMPROVEMENT

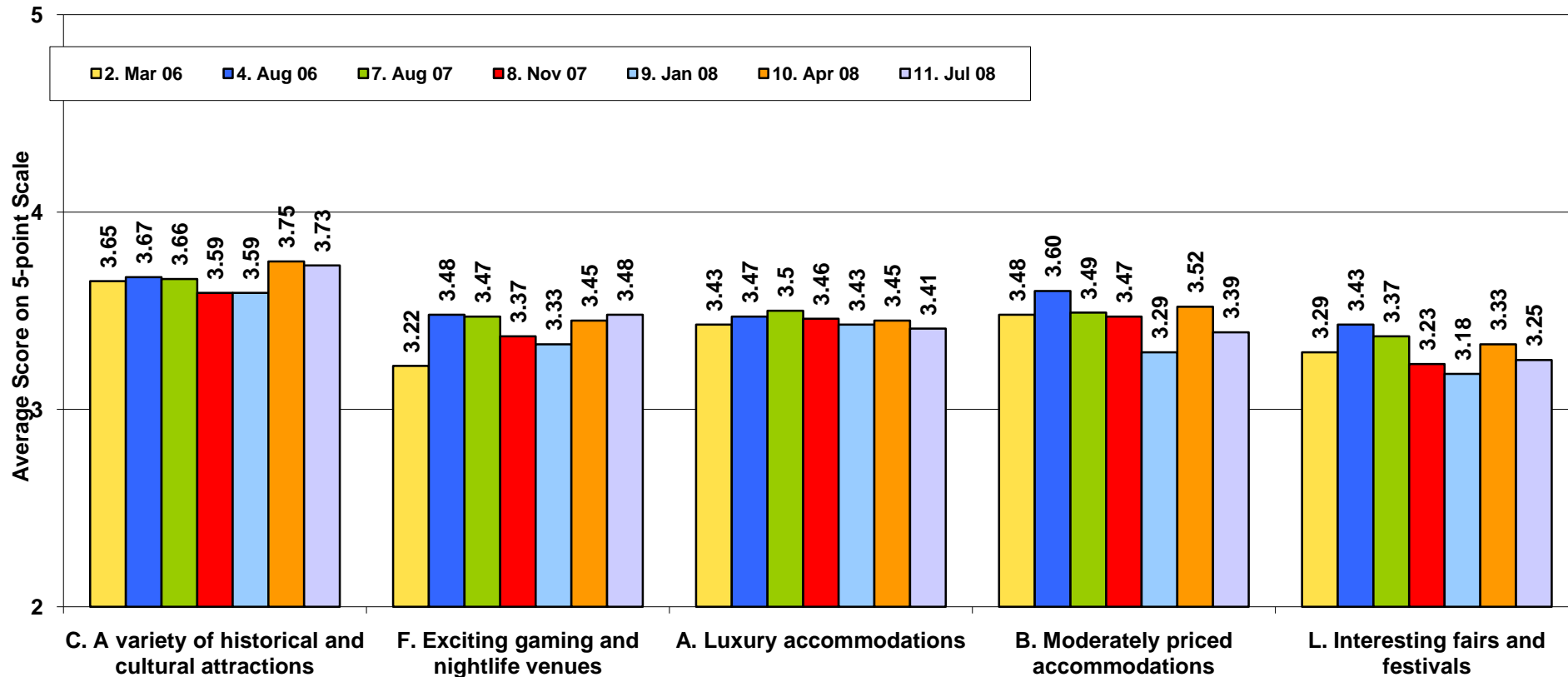
Attributes Of High Importance, Low Performance



ATLANTA

Louisiana's Performance on Attributes to COMMUNICATE NICHE

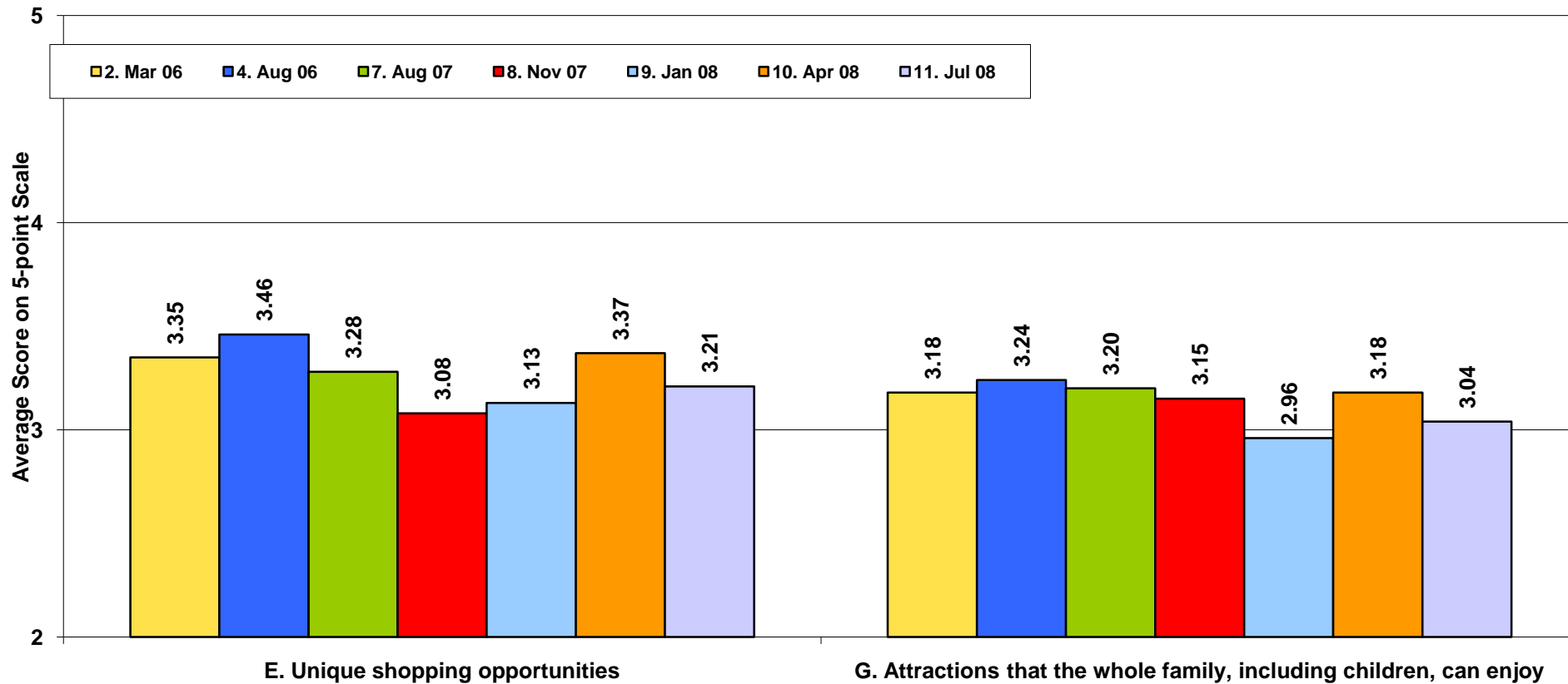
Attributes Of Low Importance, High Performance



ATLANTA

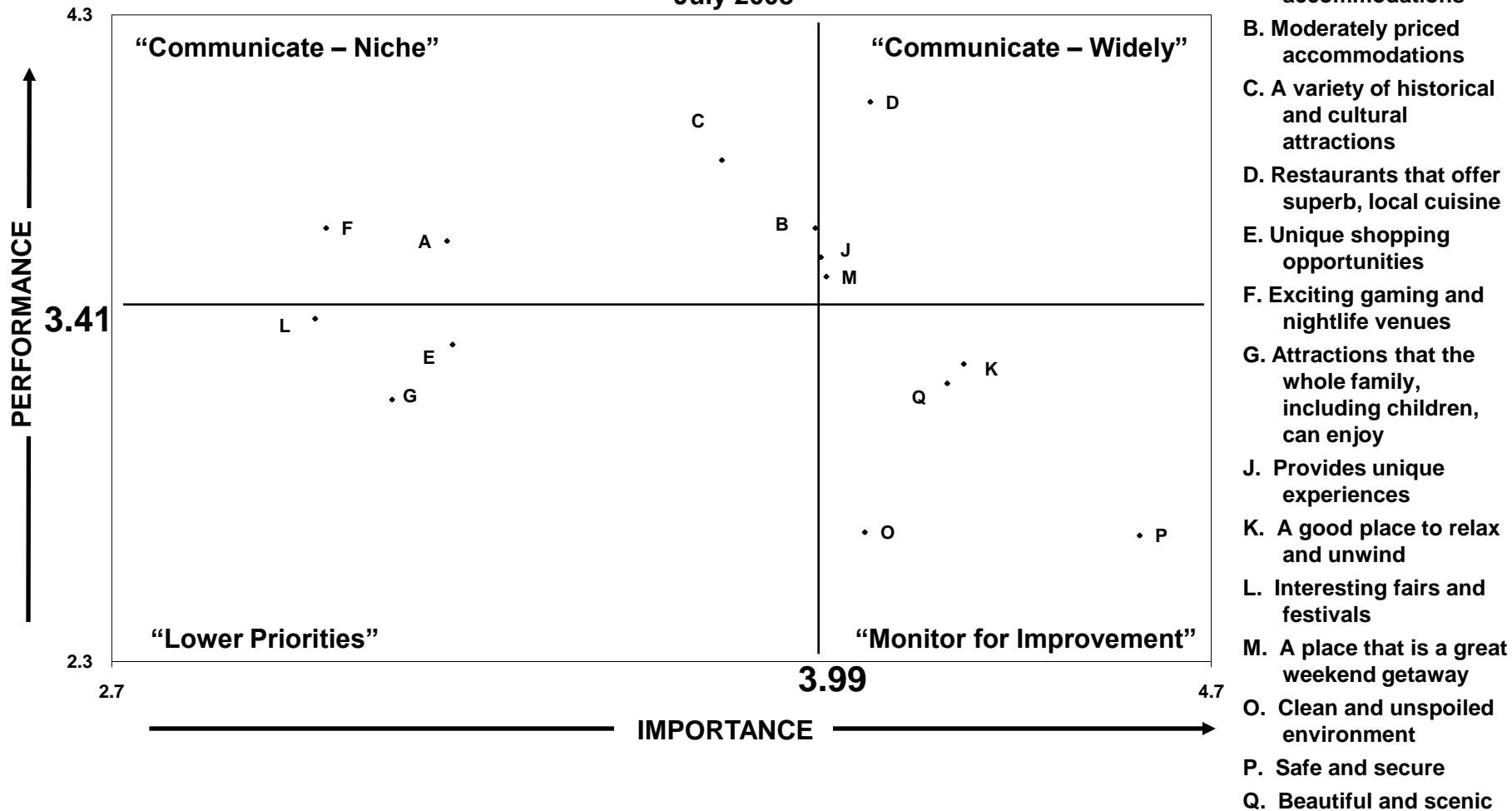
Louisiana's Performance on Attributes that are LOWER PRIORITIES

Attributes Of Low Importance, Low Performance



Importance/Performance of Louisiana among HOUSTON Respondents

July 2008



HOUSTON

Importance of Leisure Travel Attributes

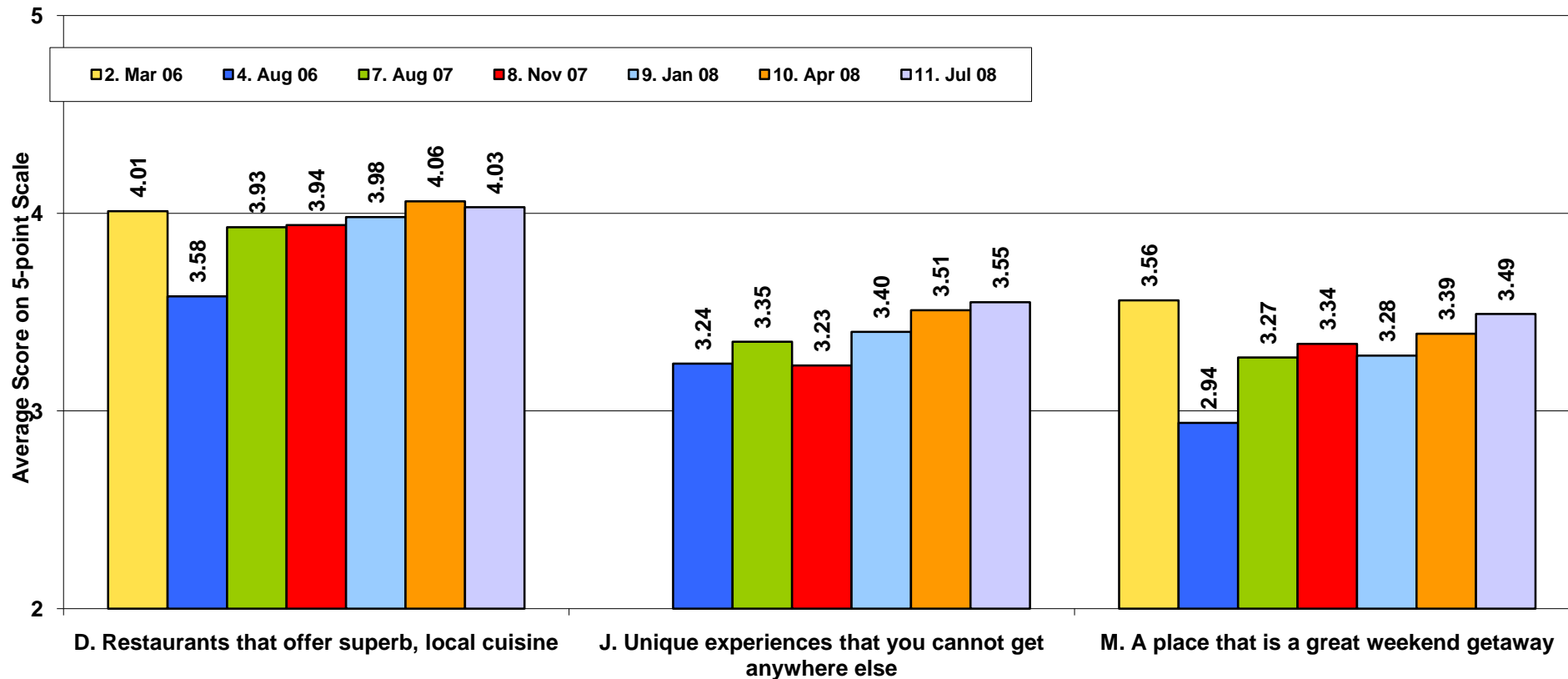
July 2008



HOUSTON

Louisiana's Performance on Attributes to COMMUNICATE WIDELY

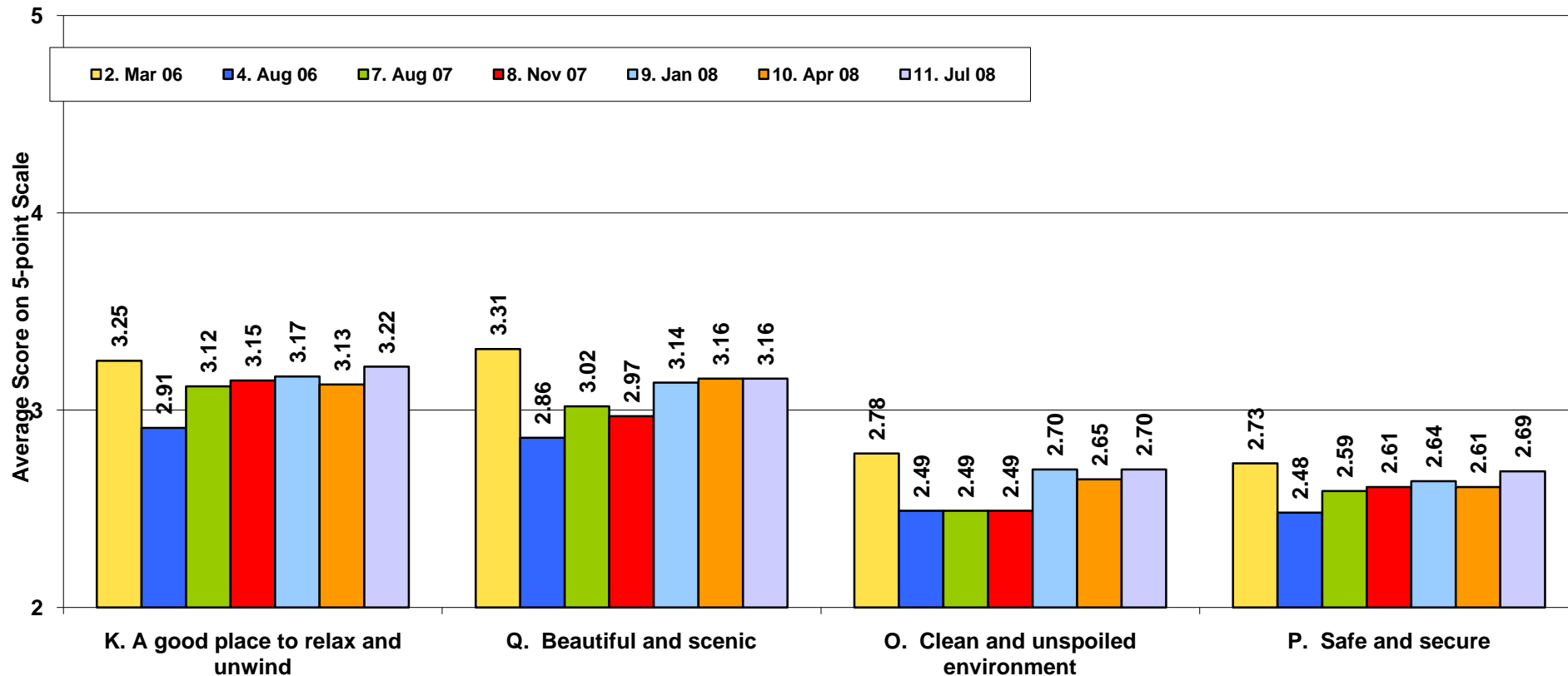
Attributes Of High Importance, High Performance



HOUSTON

Louisiana's Performance on Attributes to MONITOR FOR IMPROVEMENT

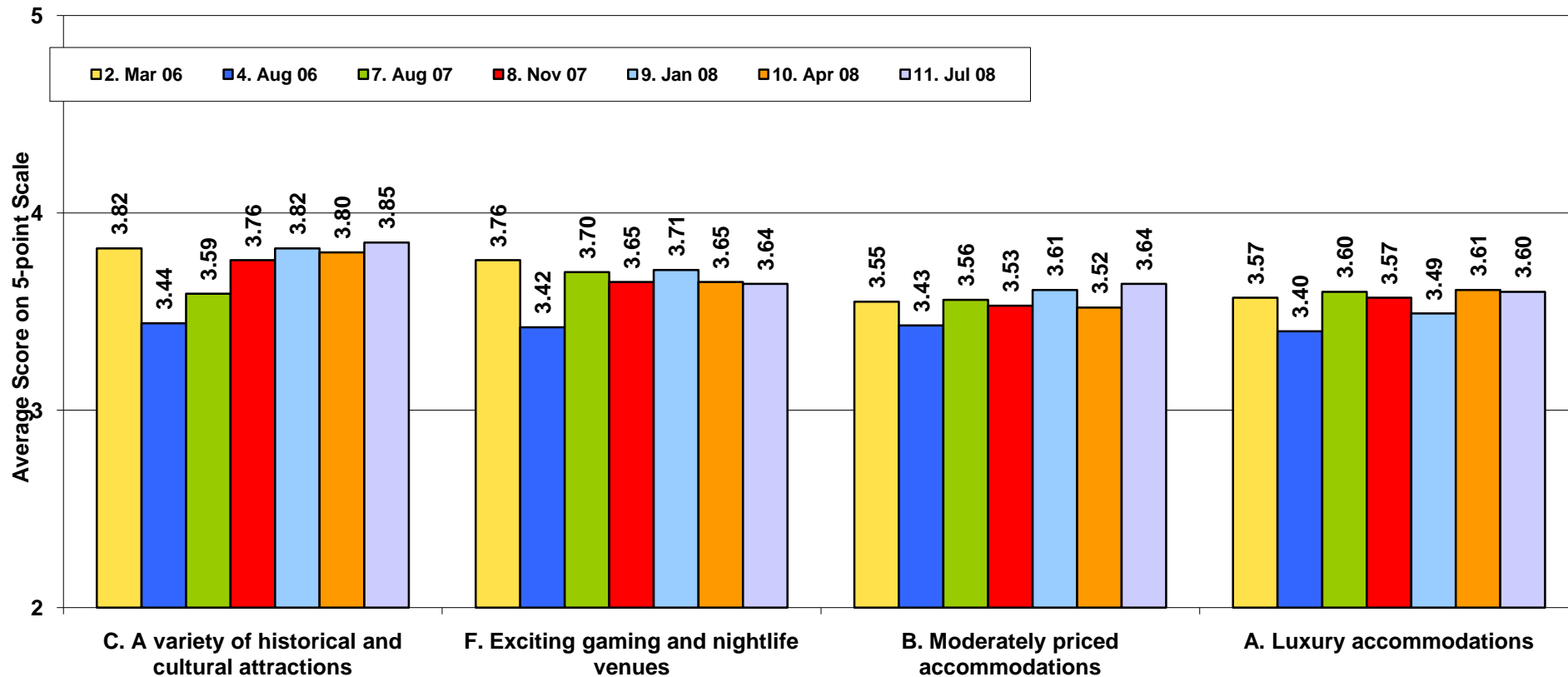
Attributes Of High Importance, Low Performance



HOUSTON

Louisiana's Performance on Attributes to COMMUNICATE NICHE

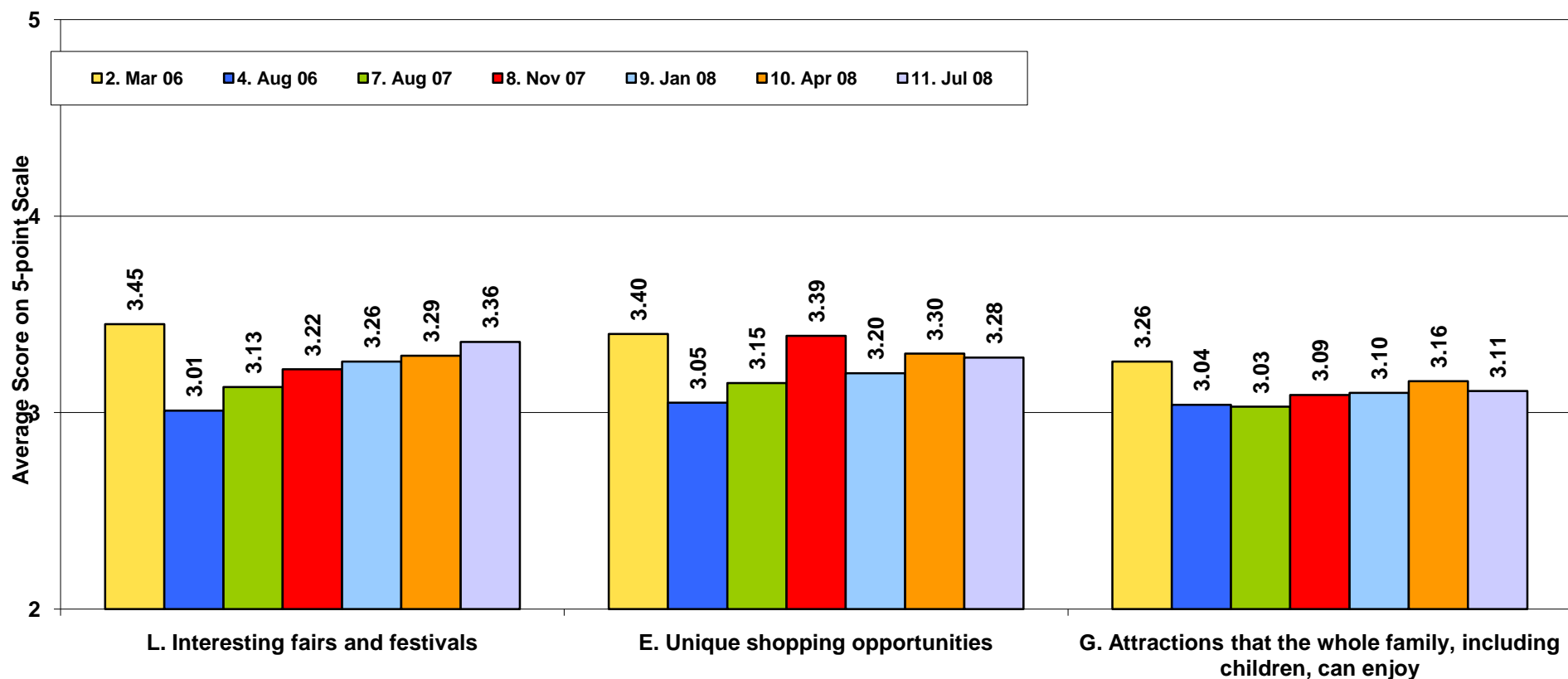
Attributes Of Low Importance, High Performance



HOUSTON

Louisiana's Performance on Attributes that are LOWER PRIORITIES

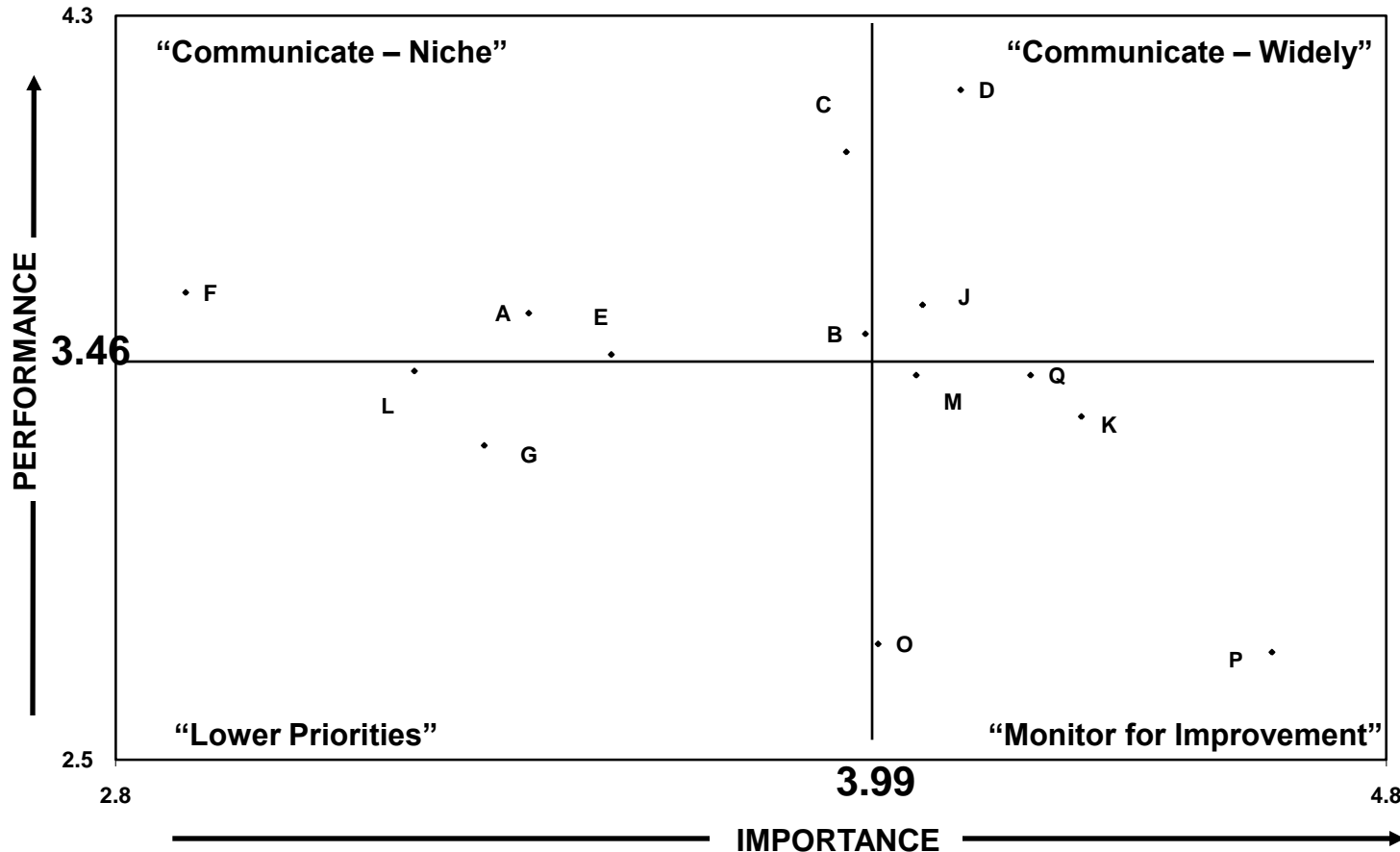
Attributes Of Low Importance, Low Performance



Importance/Performance of Louisiana among OTHER TARGET MARKET Respondents

(Dallas, Pensacola, Memphis, Jackson, Mobile, Birmingham)

July 2008

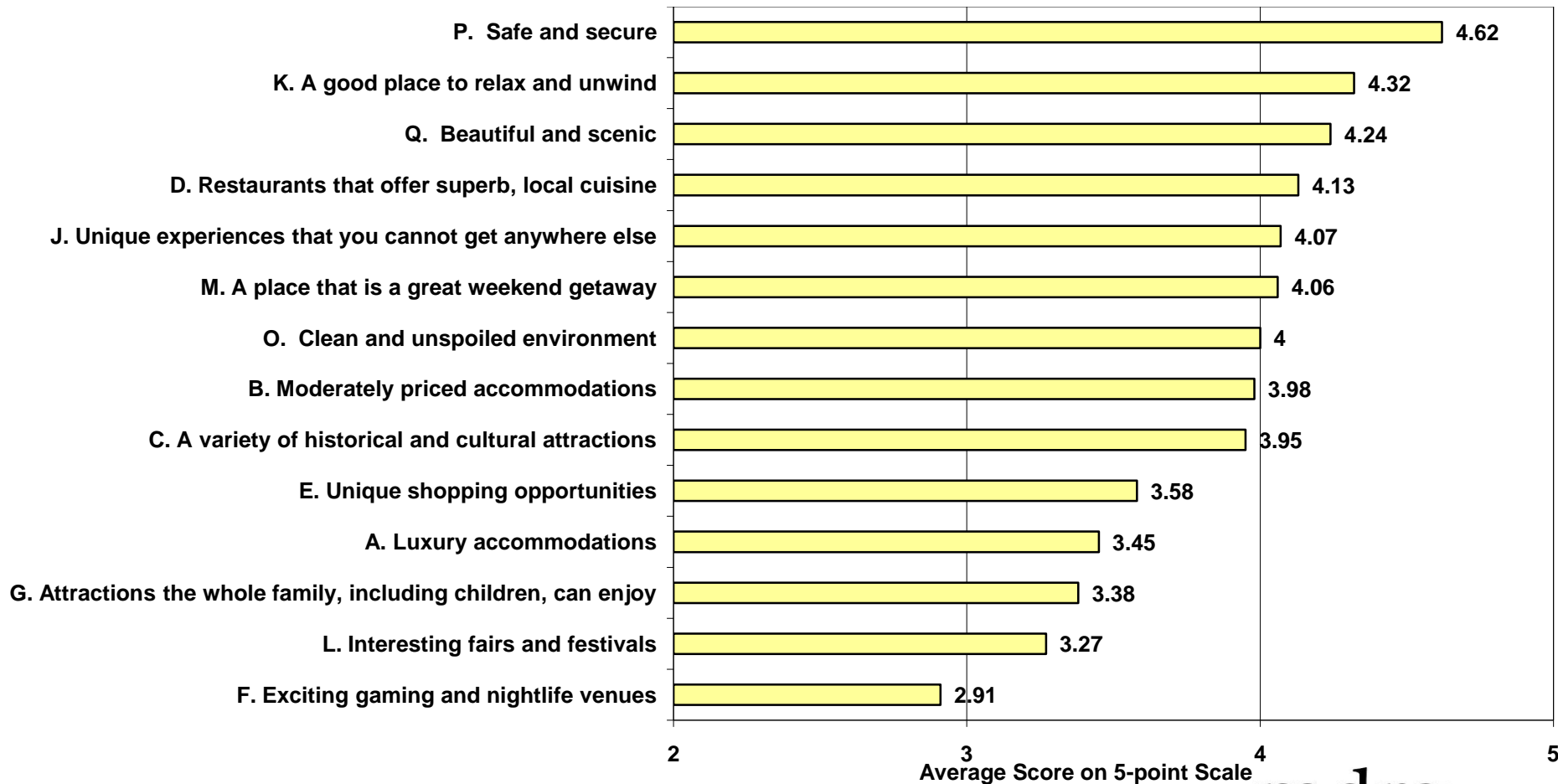


- A. Luxury accommodations
- B. Moderately priced accommodations
- C. A variety of historical and cultural attractions
- D. Restaurants that offer superb, local cuisine
- E. Unique shopping opportunities
- F. Exciting gaming and nightlife venues
- G. Attractions that the whole family, including children, can enjoy
- J. Provides unique experiences
- K. A good place to relax and unwind
- L. Interesting fairs and festivals
- M. A place that is a great weekend getaway
- O. Clean and unspoiled environment
- P. Safe and secure
- Q. Beautiful and scenic

OTHER TARGET MARKETS

Importance of Leisure Travel Attributes

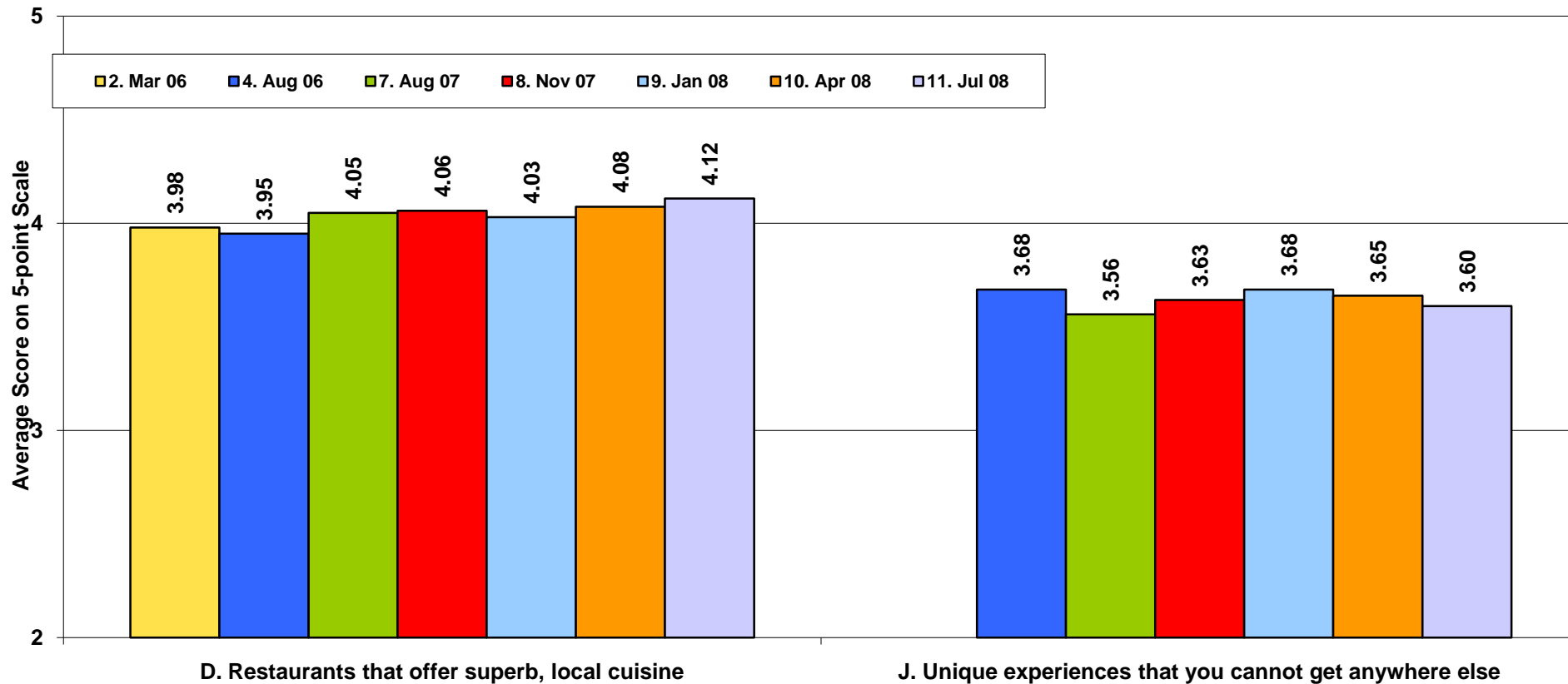
July 2008



OTHER TARGET MARKETS

Louisiana's Performance on Attributes to COMMUNICATE WIDELY

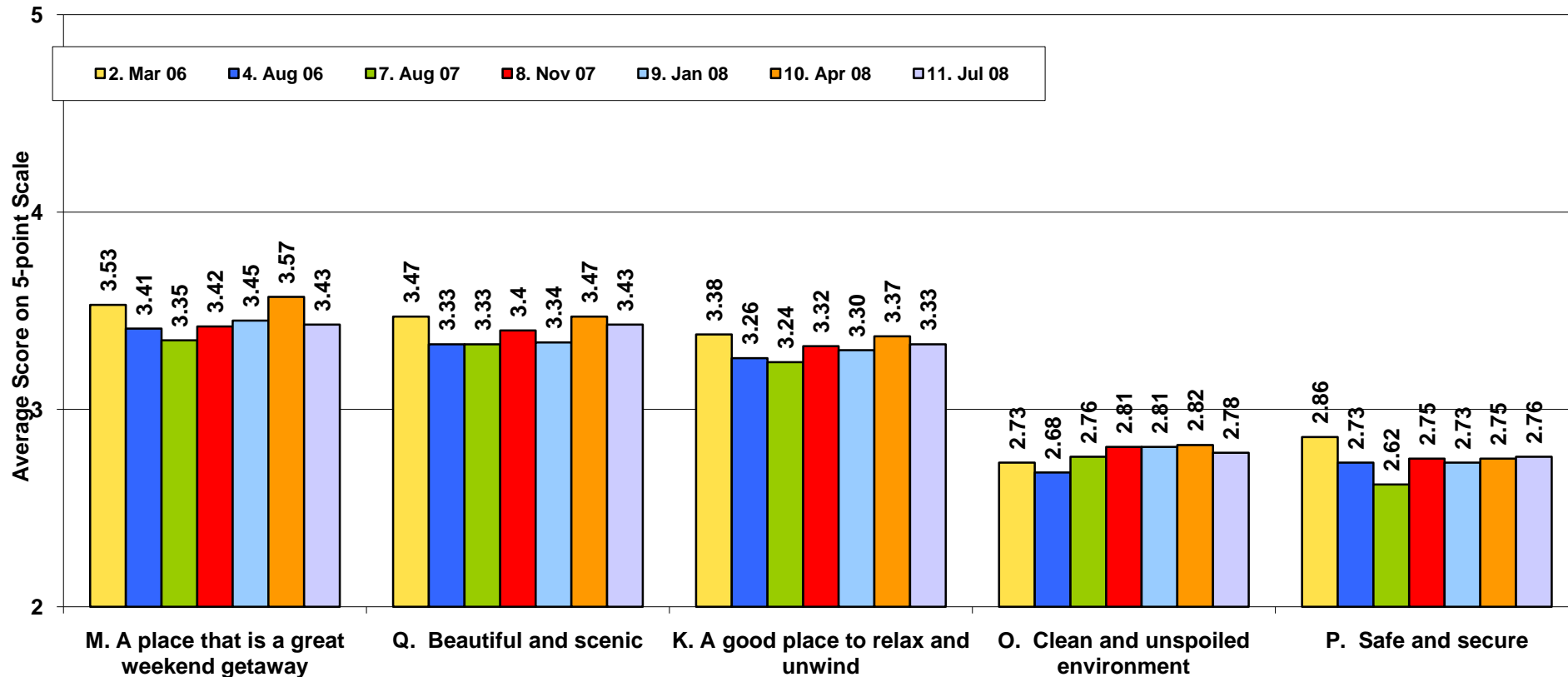
Attributes Of High Importance, High Performance



OTHER TARGET MARKETS

Louisiana's Performance on Attributes to MONITOR FOR IMPROVEMENT

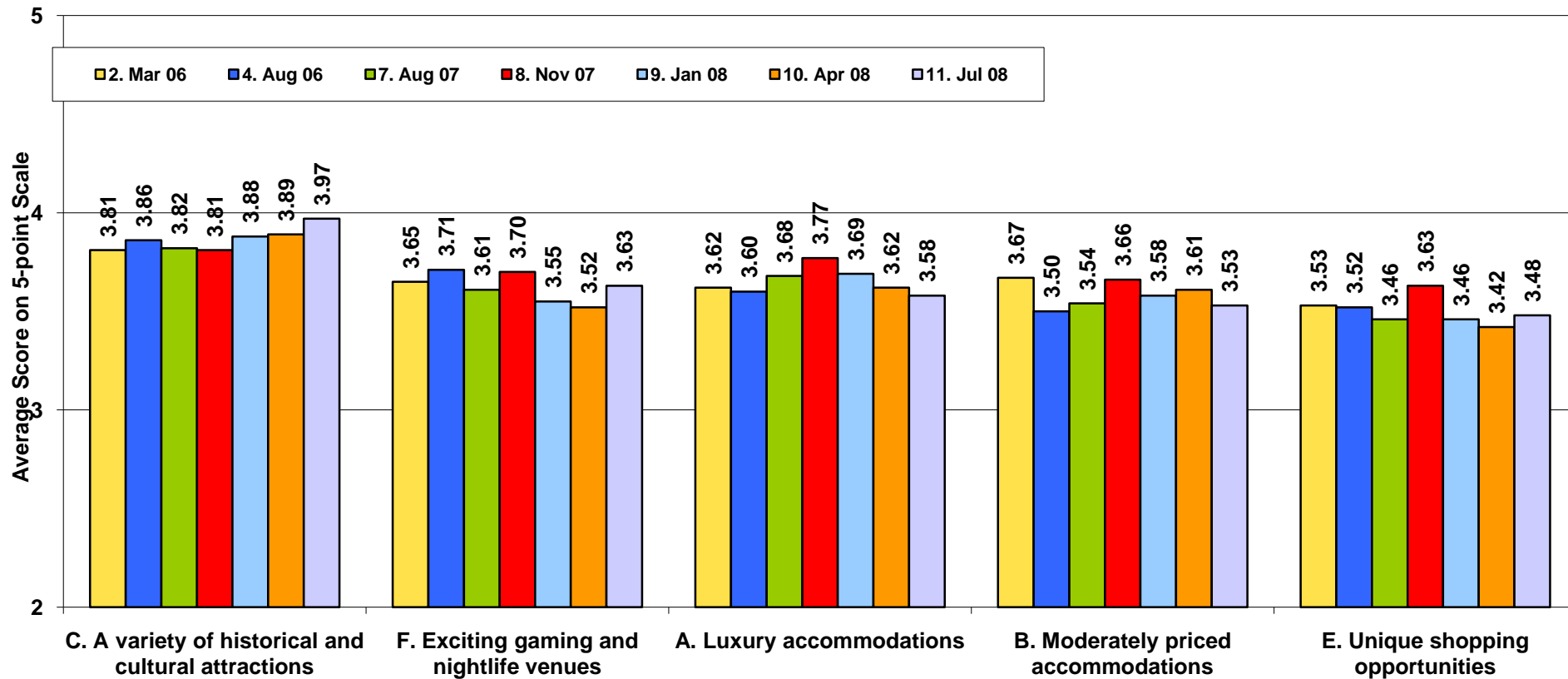
Attributes Of High Importance, Low Performance



OTHER TARGET MARKETS

Louisiana's Performance on Attributes to COMMUNICATE NICHE

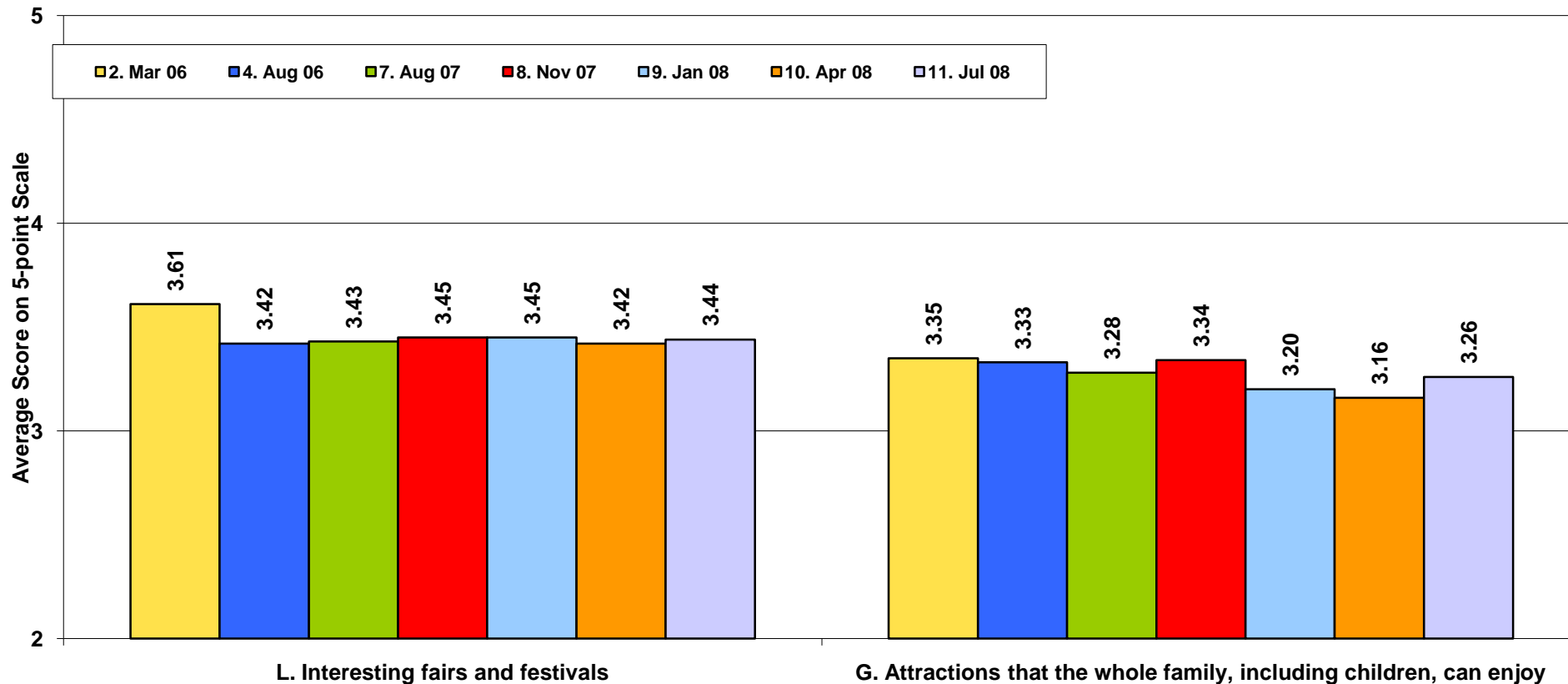
Attributes Of Low Importance, High Performance



OTHER TARGET MARKETS

Louisiana's Performance on Attributes that are LOWER PRIORITIES

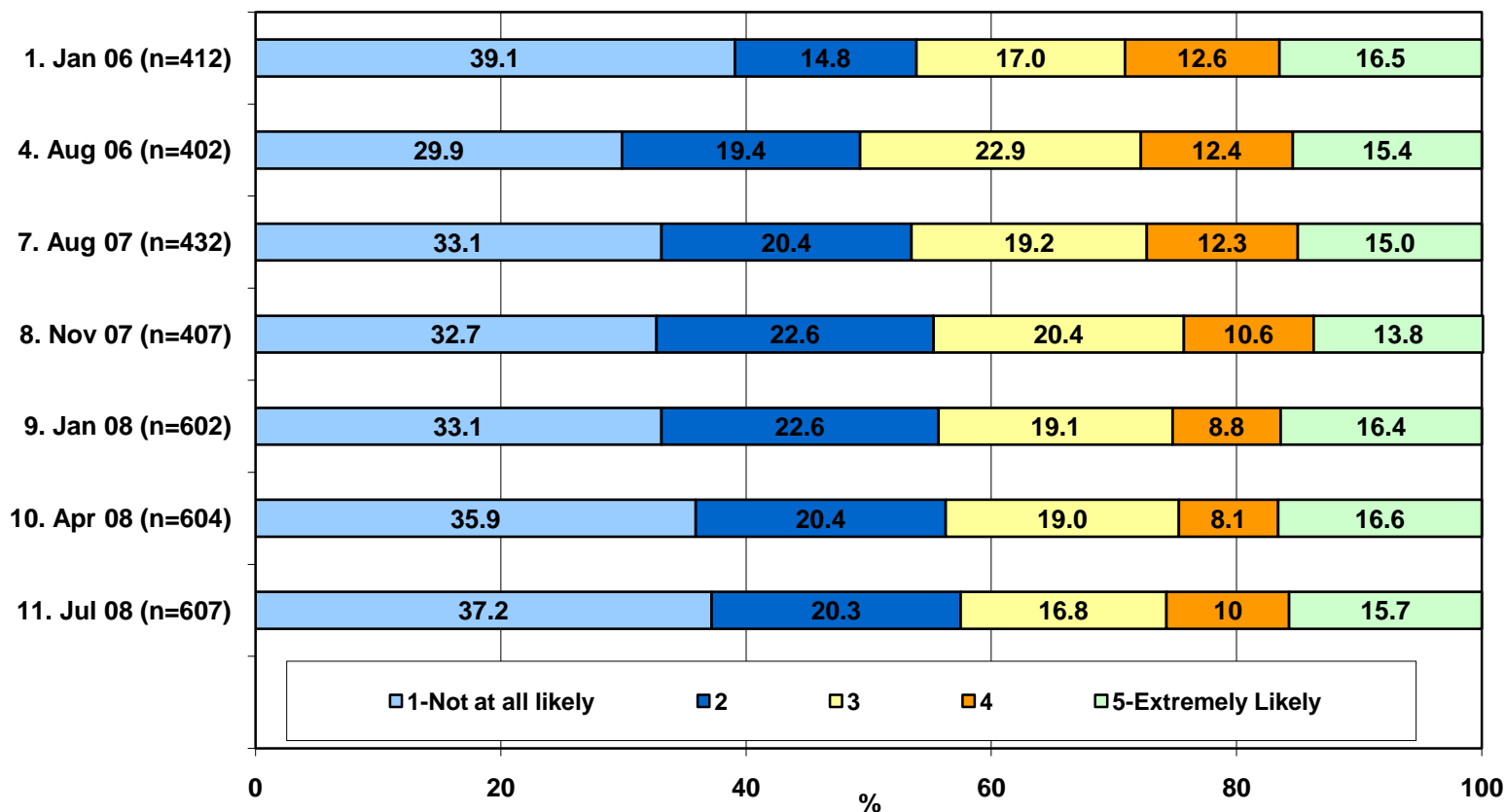
Attributes Of Low Importance, Low Performance



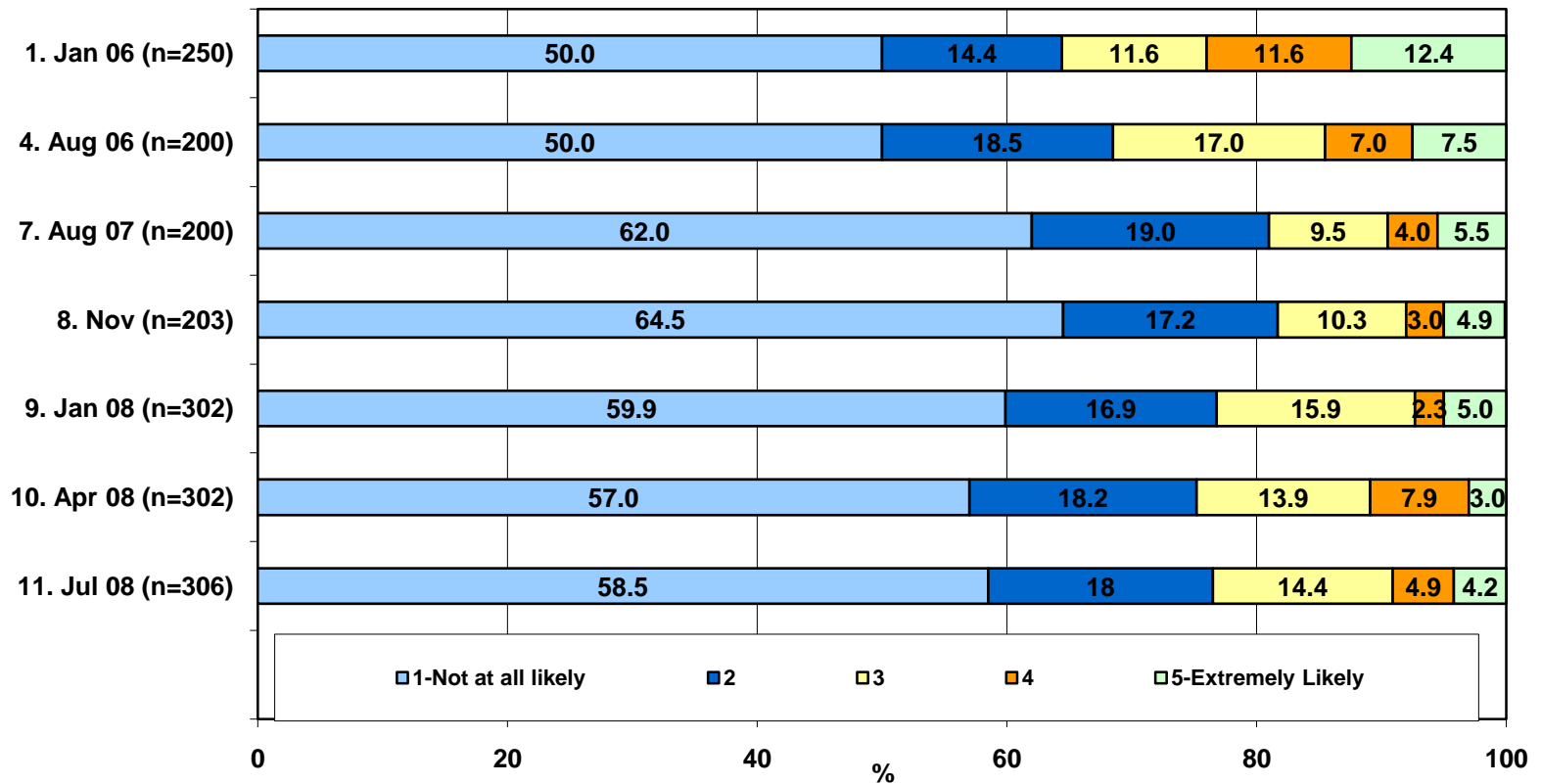
Appendix B: Likelihood to Visit Scorecards

TOTAL KEY MARKETS

Likelihood to Visit Louisiana



NATIONWIDE Likelihood to Visit Louisiana



Appendix C: Questionnaire